

Global Automotive Grade Chip Inductor Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Automotive Grade Chip Inductor market size is expected to reach \$ 4686 million by 2032, rising at a market growth of 9.4% CAGR during the forecast period (2026-2032).

Automotive Grade Chip Inductors are surface-mount inductive components designed and qualified for automotive electronic systems. The market includes multilayer chip inductors, wire-wound chip inductors, molded metal-composite SMD power inductors, thin-film chip inductors, Power-over-Coax inductors, RF chip inductors, and high-current SMD power inductors used in automotive applications. The scope focuses on automotive-qualified or automotive-targeted chip inductors, typically compliant with AEC-Q200, IATF 16949, PPAP, or customer-specific reliability requirements. The scope excludes consumer-grade inductors, ferrite beads, common-mode chokes, transformers, DC/DC modules, and distributors.

Key Findings

AEC-Q200 qualification is a key entry requirement for automotive chip inductors Power chip inductors are the largest product segment ADAS, infotainment, body electronics, and xEV systems are the major demand drivers Miniaturization and high-current performance are becoming increasingly important Japanese, Korean, European, U.

S., and Chinese suppliers all participate in the competitive landscape

Market Trends

The Automotive-grade Chip Inductors market is moving toward smaller size, higher current rating, lower DC resistance, better saturation performance, higher operating temperature, improved mechanical strength, and stronger electromagnetic compatibility. Automotive electronic systems are becoming denser and more power-hungry, which increases demand for compact inductors that can maintain stable performance under heat, vibration, board bending, and long service cycles.

A major trend is the shift from traditional ferrite and multilayer inductors toward metal composite and molded power inductors in automotive power circuits. These products support higher current, improved DC bias characteristics, and better power density. At the same time, RF and high-frequency chip inductors remain important in automotive connectivity, keyless entry, telematics, GNSS, V2X, tire pressure monitoring, infotainment, and antenna-related circuits.

Another trend is the expansion of automotive inductor demand from traditional body electronics and infotainment into ADAS, electric vehicles, battery management, LED lighting, domain controllers, onboard chargers, and high-voltage auxiliary power systems. As vehicles adopt more cameras, sensors, radar modules, processors, displays, wireless connectivity, and electrified powertrains, the number and performance requirements of automotive-grade inductors continue to rise.

Market Dynamics

Drivers

Demand is driven by increasing electronic content per vehicle, xEV adoption, ADAS penetration, higher power density in automotive ECUs, growth in vehicle connectivity, and stricter requirements for EMI suppression and power integrity. Automotive chip inductors are essential in DC-DC converters, voltage regulation, noise filtering, signal paths, RF matching, and power supply stabilization. The shift toward centralized and zonal vehicle architectures also increases the need for compact, reliable, and high-current passive components.

Restraints

The market is restrained by strict automotive qualification requirements, long customer validation cycles, high reliability testing costs, material cost fluctuation, and pressure from automotive OEMs and Tier 1 suppliers to reduce component cost. Automotive chip inductors must withstand thermal cycling, vibration, humidity, mechanical stress, and long operating lifetimes, which raises the barrier for new suppliers. In lower-end applications, price competition remains intense, especially for standard multilayer and ferrite chip inductors.

Opportunities

Key opportunities are concentrated in xEV power management, battery management systems, ADAS camera modules, radar and sensor modules, automotive LED lighting, infotainment, connectivity, domain controllers, and high-voltage auxiliary systems. High-current metal power inductors, miniaturized RF chip inductors, high-temperature inductors, low-DCR inductors, and products optimized for compact automotive power supplies are expected to see stronger demand.

Chinese suppliers have opportunities in automotive electronics localization, especially in infotainment, body electronics, LED lighting, BMS, and cost-sensitive power inductor applications. Global suppliers with strong automotive qualification, stable materials, process control, and long-term supply capability remain better positioned in safety-critical, high-reliability, and high-current applications.

Challenges

The main challenges include maintaining inductance stability under DC bias, reducing heat generation, improving saturation current, lowering DCR, preventing cracking under board bending stress, ensuring solder joint reliability, and meeting automotive-grade reliability requirements. For high-frequency chip inductors, maintaining Q factor, self-resonant frequency, tolerance control, and RF stability is critical. For power chip inductors, thermal performance, magnetic material stability, shielding, audible noise, and current handling are key technical challenges.

Industry Chain Analysis

The upstream chain includes ferrite materials, metal magnetic powders, ceramic materials, copper wire, copper paste, silver paste, insulation materials, electrode

materials, molding compounds, magnetic cores, plating materials, and precision processing equipment. Material performance directly affects inductance stability, saturation current, DCR, temperature rise, mechanical strength, and long-term reliability.

Midstream manufacturers design and produce automotive chip inductors through ceramic multilayer processing, wire winding, thin-film processing, molding, pressing, sintering, electrode formation, plating, marking, electrical testing, reliability testing, and automotive qualification. Key process capabilities include material formulation, magnetic core design, winding control, low-resistance electrode design, shielding structure, miniaturization, automated testing, and AEC-Q200 reliability validation.

Downstream customers include automotive Tier 1 suppliers, ECU manufacturers, power module makers, infotainment system suppliers, ADAS module suppliers, lighting system suppliers, battery management system suppliers, onboard charger suppliers, telematics manufacturers, and automotive OEM electronics platforms.

Segment Insights

By product type, power chip inductors represent the largest segment because they are widely used in automotive DC-DC converters, ECU power rails, sensor modules, LED lighting, BMS, and xEV auxiliary power circuits. RF and high-frequency chip inductors form another important segment, mainly serving automotive communication, keyless entry, GNSS, V2X, tire pressure monitoring, infotainment, and antenna matching circuits.

By material structure, metal composite inductors are gaining share in high-current and compact power applications, while ferrite and multilayer chip inductors remain important in standard filtering, signal, and lower-current applications. By reliability grade, AEC-Q200-qualified products are the core of the market, while higher-temperature and safety-critical grades are increasingly required in xEV, ADAS, and powertrain electronics.

Downstream Market Opportunities

The most attractive downstream opportunities are in electric vehicles, hybrid vehicles, battery management systems, ADAS cameras, radar modules, automotive lighting, domain controllers, infotainment systems, connectivity modules, and high-voltage auxiliary power supplies. As vehicle electrification and intelligence increase, automotive

systems require more compact and reliable passive components to support power conversion, signal integrity, EMI control, and RF connectivity.

Electric vehicles create particularly strong demand for high-current and high-temperature inductors used in BMS, DC-DC conversion, onboard power supplies, lighting, thermal management, and auxiliary electronics. ADAS and autonomous driving applications also increase the need for miniaturized inductors with stable performance in camera, radar, sensor fusion, and high-speed processing modules.

Regional Insights

Japan remains the strongest supply region, led by Murata, TDK, Taiyo Yuden, Panasonic, and Sumida. North America and Europe remain strong in high-reliability power inductors and engineering support through Bourns, Vishay, Coilcraft, Würth Elektronik, and Eaton. Taiwan and China are expanding rapidly through YAGEO/Chilisin/KEMET, Tai-Tech, Cyntec, and Sunlord, supported by EV, energy storage, and local automotive electronics supply chains. South Korea participates through Samsung Electro-Mechanics, especially in automotive metal power inductors.

Competitive Landscape Analysis

The market is led by global passive component and magnetic component suppliers including Murata, TDK, Taiyo Yuden, Panasonic, Samsung Electro-Mechanics, Bourns, Vishay, Coilcraft, Würth Elektronik, Sumida, YAGEO/KEMET, Sunlord, Tai-Tech, and Cyntec. Competition is based on AEC-Q200 qualification, high-temperature reliability, current handling, DCR, magnetic shielding, acoustic noise, miniaturization, PPAP support, and customer design-in capability. Future competition will focus on metal-composite materials, high-current miniaturization, PoC inductors, low-noise power inductors, and localization of automotive supply chains.

Report Scope

This report studies the global Automotive Grade Chip Inductor production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Automotive

Grade Chip Inductor 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 Automotive Grade Chip Inductor that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Automotive Grade Chip Inductor total production and demand, 2021-2032, (K Units)

Global Automotive Grade Chip Inductor total production value, 2021-2032, (USD Million)

Global Automotive Grade Chip Inductor production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Automotive Grade Chip Inductor consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Automotive Grade Chip Inductor domestic production, consumption, key domestic manufacturers and share

Global Automotive Grade Chip Inductor production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Automotive Grade Chip Inductor production by Qualification Level, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Automotive Grade Chip Inductor production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Automotive Grade Chip Inductor 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 Murata Manufacturing Co., Ltd., TDK Corporation, Taiyo Yuden Co., Ltd., Panasonic Industry, Samsung Electro-Mechanics,

Bourns, Inc., Vishay Intertechnology, Inc., Coilcraft, Inc., Würth Elektronik eiSos, Sumida Corporation, 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 Automotive Grade Chip Inductor market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Qualification Level, 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 Automotive Grade Chip Inductor Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Automotive Grade Chip Inductor Supply, Demand and Key Producers, 2026-2032

Global Automotive Grade Chip Inductor Market, Segmentation by Qualification Level:

AEC-Q200 Grade 0 Products

AEC-Q200 Grade 1 Products

AEC-Q200 Grade 2/3 Products

Global Automotive Grade Chip Inductor Market, Segmentation by Electrical Function:

Power Storage Inductors

RF Matching Inductors

PoC Bias Inductors

Signal Filtering Inductors

High-current Choke Inductors

Global Automotive Grade Chip Inductor Market, Segmentation by Product Construction:

Multilayer Ceramic/Ferrite Chip Inductors

Ceramic-core Wire-wound Chip Inductors

Ferrite-core Shielded Power Chip Inductors

Molded Metal-composite SMD Power Inductors

Thin-film Chip Inductors

Global Automotive Grade Chip Inductor Market, Segmentation by Application:

xEV Power Conversion and Battery Systems

ADAS and Autonomous Driving Electronics

Infotainment, Connectivity and RF

Body Electronics and Lighting

Companies Profiled:

Murata Manufacturing Co., Ltd.

TDK Corporation

Taiyo Yuden Co., Ltd.

Panasonic Industry

Samsung Electro-Mechanics

Bourns, Inc.

Vishay Intertechnology, Inc.

Coilcraft, Inc.

Würth Elektronik eiSos

Sumida Corporation

YAGEO Group

Shenzhen Sunlord Electronics Co., Ltd.

Tai-Tech Advanced Electronics Co., Ltd.

Feng-Jui Technology Co., Ltd.

Eaton Electronics

KYOCERA AVX

Abracon

Delta Electronics, Inc.

Key Questions Answered:

1. How big is the global Automotive Grade Chip Inductor market?
2. What is the demand of the global Automotive Grade Chip Inductor market?
3. What is the year over year growth of the global Automotive Grade Chip Inductor market?
4. What is the production and production value of the global Automotive Grade Chip Inductor market?
5. Who are the key producers in the global Automotive Grade Chip Inductor market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

1.1 Automotive Grade Chip Inductor Introduction

1.2 World Automotive Grade Chip Inductor Supply & Forecast

1.2.1 World Automotive Grade Chip Inductor Production Value (2021 & 2025 & 2032)

1.2.2 World Automotive Grade Chip Inductor Production (2021-2032)

1.2.3 World Automotive Grade Chip Inductor Pricing Trends (2021-2032)

1.3 World Automotive Grade Chip Inductor Production by Region (Based on Production Site)

1.3.1 World Automotive Grade Chip Inductor Production Value by Region (2021-2032)

1.3.2 World Automotive Grade Chip Inductor Production by Region (2021-2032)

1.3.3 World Automotive Grade Chip Inductor Average Price by Region (2021-2032)

1.3.4 North America Automotive Grade Chip Inductor Production (2021-2032)

1.3.5 Europe Automotive Grade Chip Inductor Production (2021-2032)

1.3.6 China Automotive Grade Chip Inductor Production (2021-2032)

1.3.7 Japan Automotive Grade Chip Inductor Production (2021-2032)

1.3.8 South Korea Automotive Grade Chip Inductor Production (2021-2032)

1.4 Market Drivers, Restraints and Trends

1.4.1 Automotive Grade Chip Inductor Market Drivers

1.4.2 Factors Affecting Demand

1.4.3 Automotive Grade Chip Inductor Major Market Trends

2 DEMAND SUMMARY

2.1 World Automotive Grade Chip Inductor Demand (2021-2032)

2.2 World Automotive Grade Chip Inductor Consumption by Region

2.2.1 World Automotive Grade Chip Inductor Consumption by Region (2021-2026)

2.2.2 World Automotive Grade Chip Inductor Consumption Forecast by Region (2027-2032)

2.3 United States Automotive Grade Chip Inductor Consumption (2021-2032)

2.4 China Automotive Grade Chip Inductor Consumption (2021-2032)

2.5 Europe Automotive Grade Chip Inductor Consumption (2021-2032)

2.6 Japan Automotive Grade Chip Inductor Consumption (2021-2032)

2.7 South Korea Automotive Grade Chip Inductor Consumption (2021-2032)

2.8 ASEAN Automotive Grade Chip Inductor Consumption (2021-2032)

2.9 India Automotive Grade Chip Inductor Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Automotive Grade Chip Inductor Production Value by Manufacturer (2021-2026)
- 3.2 World Automotive Grade Chip Inductor Production by Manufacturer (2021-2026)
- 3.3 World Automotive Grade Chip Inductor Average Price by Manufacturer (2021-2026)
- 3.4 Automotive Grade Chip Inductor Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Automotive Grade Chip Inductor Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Automotive Grade Chip Inductor in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Automotive Grade Chip Inductor in 2025
- 3.6 Automotive Grade Chip Inductor Market: Overall Company Footprint Analysis
 - 3.6.1 Automotive Grade Chip Inductor Market: Region Footprint
 - 3.6.2 Automotive Grade Chip Inductor Market: Company Product Type Footprint
 - 3.6.3 Automotive Grade Chip Inductor Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Automotive Grade Chip Inductor Production Value Comparison
 - 4.1.1 United States VS China: Automotive Grade Chip Inductor Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Automotive Grade Chip Inductor Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Automotive Grade Chip Inductor Production Comparison
 - 4.2.1 United States VS China: Automotive Grade Chip Inductor Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Automotive Grade Chip Inductor Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Automotive Grade Chip Inductor Consumption Comparison
 - 4.3.1 United States VS China: Automotive Grade Chip Inductor Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Automotive Grade Chip Inductor Consumption Market

Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Automotive Grade Chip Inductor Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Automotive Grade Chip Inductor Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Automotive Grade Chip Inductor Production Value (2021-2026)

4.4.3 United States Based Manufacturers Automotive Grade Chip Inductor Production (2021-2026)

4.5 China Based Automotive Grade Chip Inductor Manufacturers and Market Share

4.5.1 China Based Automotive Grade Chip Inductor Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Automotive Grade Chip Inductor Production Value (2021-2026)

4.5.3 China Based Manufacturers Automotive Grade Chip Inductor Production (2021-2026)

4.6 Rest of World Based Automotive Grade Chip Inductor Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Automotive Grade Chip Inductor Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Automotive Grade Chip Inductor Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Automotive Grade Chip Inductor Production (2021-2026)

5 MARKET ANALYSIS BY QUALIFICATION LEVEL

5.1 World Automotive Grade Chip Inductor Market Size Overview by Qualification Level: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Qualification Level

5.2.1 AEC-Q200 Grade 0 Products

5.2.2 AEC-Q200 Grade 1 Products

5.2.3 AEC-Q200 Grade 2/3 Products

5.3 Market Segment by Qualification Level

5.3.1 World Automotive Grade Chip Inductor Production by Qualification Level (2021-2032)

5.3.2 World Automotive Grade Chip Inductor Production Value by Qualification Level (2021-2032)

5.3.3 World Automotive Grade Chip Inductor Average Price by Qualification Level

(2021-2032)

6 MARKET ANALYSIS BY ELECTRICAL FUNCTION

6.1 World Automotive Grade Chip Inductor Market Size Overview by Electrical Function: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Electrical Function

6.2.1 Power Storage Inductors

6.2.2 RF Matching Inductors

6.2.3 PoC Bias Inductors

6.2.4 Signal Filtering Inductors

6.2.5 High-current Choke Inductors

6.3 Market Segment by Electrical Function

6.3.1 World Automotive Grade Chip Inductor Production by Electrical Function (2021-2032)

6.3.2 World Automotive Grade Chip Inductor Production Value by Electrical Function (2021-2032)

6.3.3 World Automotive Grade Chip Inductor Average Price by Electrical Function (2021-2032)

7 MARKET ANALYSIS BY PRODUCT CONSTRUCTION

7.1 World Automotive Grade Chip Inductor Market Size Overview by Product Construction: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Product Construction

7.2.1 Multilayer Ceramic/Ferrite Chip Inductors

7.2.2 Ceramic-core Wire-wound Chip Inductors

7.2.3 Ferrite-core Shielded Power Chip Inductors

7.2.4 Molded Metal-composite SMD Power Inductors

7.2.5 Thin-film Chip Inductors

7.3 Market Segment by Product Construction

7.3.1 World Automotive Grade Chip Inductor Production by Product Construction (2021-2032)

7.3.2 World Automotive Grade Chip Inductor Production Value by Product Construction (2021-2032)

7.3.3 World Automotive Grade Chip Inductor Average Price by Product Construction (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Automotive Grade Chip Inductor Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 xEV Power Conversion and Battery Systems

8.2.2 ADAS and Autonomous Driving Electronics

8.2.3 Infotainment, Connectivity and RF

8.2.4 Body Electronics and Lighting

8.3 Market Segment by Application

8.3.1 World Automotive Grade Chip Inductor Production by Application (2021-2032)

8.3.2 World Automotive Grade Chip Inductor Production Value by Application (2021-2032)

8.3.3 World Automotive Grade Chip Inductor Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Murata Manufacturing Co., Ltd.

9.1.1 Murata Manufacturing Co., Ltd. Details

9.1.2 Murata Manufacturing Co., Ltd. Major Business

9.1.3 Murata Manufacturing Co., Ltd. Automotive Grade Chip Inductor Product and Services

9.1.4 Murata Manufacturing Co., Ltd. Automotive Grade Chip Inductor Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Murata Manufacturing Co., Ltd. Recent Developments/Updates

9.1.6 Murata Manufacturing Co., Ltd. Competitive Strengths & Weaknesses

9.2 TDK Corporation

9.2.1 TDK Corporation Details

9.2.2 TDK Corporation Major Business

9.2.3 TDK Corporation Automotive Grade Chip Inductor Product and Services

9.2.4 TDK Corporation Automotive Grade Chip Inductor Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 TDK Corporation Recent Developments/Updates

9.2.6 TDK Corporation Competitive Strengths & Weaknesses

9.3 Taiyo Yuden Co., Ltd.

9.3.1 Taiyo Yuden Co., Ltd. Details

9.3.2 Taiyo Yuden Co., Ltd. Major Business

9.3.3 Taiyo Yuden Co., Ltd. Automotive Grade Chip Inductor Product and Services

9.3.4 Taiyo Yuden Co., Ltd. Automotive Grade Chip Inductor Production, Price, Value,

Gross Margin and Market Share (2021-2026)

9.3.5 Taiyo Yuden Co., Ltd. Recent Developments/Updates

9.3.6 Taiyo Yuden Co., Ltd. Competitive Strengths & Weaknesses

9.4 Panasonic Industry

9.4.1 Panasonic Industry Details

9.4.2 Panasonic Industry Major Business

9.4.3 Panasonic Industry Automotive Grade Chip Inductor Product and Services

9.4.4 Panasonic Industry Automotive Grade Chip Inductor Production, Price, Value,

Gross Margin and Market Share (2021-2026)

9.4.5 Panasonic Industry Recent Developments/Updates

9.4.6 Panasonic Industry Competitive Strengths & Weaknesses

9.5 Samsung Electro-Mechanics

9.5.1 Samsung Electro-Mechanics Details

9.5.2 Samsung Electro-Mechanics Major Business

9.5.3 Samsung Electro-Mechanics Automotive Grade Chip Inductor Product and Services

9.5.4 Samsung Electro-Mechanics Automotive Grade Chip Inductor Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 Samsung Electro-Mechanics Recent Developments/Updates

9.5.6 Samsung Electro-Mechanics Competitive Strengths & Weaknesses

9.6 Bourns, Inc.

9.6.1 Bourns, Inc. Details

9.6.2 Bourns, Inc. Major Business

9.6.3 Bourns, Inc. Automotive Grade Chip Inductor Product and Services

9.6.4 Bourns, Inc. Automotive Grade Chip Inductor Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 Bourns, Inc. Recent Developments/Updates

9.6.6 Bourns, Inc. Competitive Strengths & Weaknesses

9.7 Vishay Intertechnology, Inc.

9.7.1 Vishay Intertechnology, Inc. Details

9.7.2 Vishay Intertechnology, Inc. Major Business

9.7.3 Vishay Intertechnology, Inc. Automotive Grade Chip Inductor Product and Services

9.7.4 Vishay Intertechnology, Inc. Automotive Grade Chip Inductor Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 Vishay Intertechnology, Inc. Recent Developments/Updates

9.7.6 Vishay Intertechnology, Inc. Competitive Strengths & Weaknesses

9.8 Coilcraft, Inc.

9.8.1 Coilcraft, Inc. Details

- 9.8.2 Coilcraft, Inc. Major Business
- 9.8.3 Coilcraft, Inc. Automotive Grade Chip Inductor Product and Services
- 9.8.4 Coilcraft, Inc. Automotive Grade Chip Inductor Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.8.5 Coilcraft, Inc. Recent Developments/Updates
- 9.8.6 Coilcraft, Inc. Competitive Strengths & Weaknesses
- 9.9 Würth Elektronik eiSos
 - 9.9.1 Würth Elektronik eiSos Details
 - 9.9.2 Würth Elektronik eiSos Major Business
 - 9.9.3 Würth Elektronik eiSos Automotive Grade Chip Inductor Product and Services
 - 9.9.4 Würth Elektronik eiSos Automotive Grade Chip Inductor Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.9.5 Würth Elektronik eiSos Recent Developments/Updates
 - 9.9.6 Würth Elektronik eiSos Competitive Strengths & Weaknesses
- 9.10 Sumida Corporation
 - 9.10.1 Sumida Corporation Details
 - 9.10.2 Sumida Corporation Major Business
 - 9.10.3 Sumida Corporation Automotive Grade Chip Inductor Product and Services
 - 9.10.4 Sumida Corporation Automotive Grade Chip Inductor Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.10.5 Sumida Corporation Recent Developments/Updates
 - 9.10.6 Sumida Corporation Competitive Strengths & Weaknesses
- 9.11 YAGEO Group
 - 9.11.1 YAGEO Group Details
 - 9.11.2 YAGEO Group Major Business
 - 9.11.3 YAGEO Group Automotive Grade Chip Inductor Product and Services
 - 9.11.4 YAGEO Group Automotive Grade Chip Inductor Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.11.5 YAGEO Group Recent Developments/Updates
 - 9.11.6 YAGEO Group Competitive Strengths & Weaknesses
- 9.12 Shenzhen Sunlord Electronics Co., Ltd.
 - 9.12.1 Shenzhen Sunlord Electronics Co., Ltd. Details
 - 9.12.2 Shenzhen Sunlord Electronics Co., Ltd. Major Business
 - 9.12.3 Shenzhen Sunlord Electronics Co., Ltd. Automotive Grade Chip Inductor Product and Services
 - 9.12.4 Shenzhen Sunlord Electronics Co., Ltd. Automotive Grade Chip Inductor Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.12.5 Shenzhen Sunlord Electronics Co., Ltd. Recent Developments/Updates
 - 9.12.6 Shenzhen Sunlord Electronics Co., Ltd. Competitive Strengths & Weaknesses

9.13 Tai-Tech Advanced Electronics Co., Ltd.

9.13.1 Tai-Tech Advanced Electronics Co., Ltd. Details

9.13.2 Tai-Tech Advanced Electronics Co., Ltd. Major Business

9.13.3 Tai-Tech Advanced Electronics Co., Ltd. Automotive Grade Chip Inductor Product and Services

9.13.4 Tai-Tech Advanced Electronics Co., Ltd. Automotive Grade Chip Inductor Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.13.5 Tai-Tech Advanced Electronics Co., Ltd. Recent Developments/Updates

9.13.6 Tai-Tech Advanced Electronics Co., Ltd. Competitive Strengths & Weaknesses

9.14 Feng-Jui Technology Co., Ltd.

9.14.1 Feng-Jui Technology Co., Ltd. Details

9.14.2 Feng-Jui Technology Co., Ltd. Major Business

9.14.3 Feng-Jui Technology Co., Ltd. Automotive Grade Chip Inductor Product and Services

9.14.4 Feng-Jui Technology Co., Ltd. Automotive Grade Chip Inductor Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.14.5 Feng-Jui Technology Co., Ltd. Recent Developments/Updates

9.14.6 Feng-Jui Technology Co., Ltd. Competitive Strengths & Weaknesses

9.15 Eaton Electronics

9.15.1 Eaton Electronics Details

9.15.2 Eaton Electronics Major Business

9.15.3 Eaton Electronics Automotive Grade Chip Inductor Product and Services

9.15.4 Eaton Electronics Automotive Grade Chip Inductor Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.15.5 Eaton Electronics Recent Developments/Updates

9.15.6 Eaton Electronics Competitive Strengths & Weaknesses

9.16 KYOCERA AVX

9.16.1 KYOCERA AVX Details

9.16.2 KYOCERA AVX Major Business

9.16.3 KYOCERA AVX Automotive Grade Chip Inductor Product and Services

9.16.4 KYOCERA AVX Automotive Grade Chip Inductor Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.16.5 KYOCERA AVX Recent Developments/Updates

9.16.6 KYOCERA AVX Competitive Strengths & Weaknesses

9.17 Abracon

9.17.1 Abracon Details

9.17.2 Abracon Major Business

9.17.3 Abracon Automotive Grade Chip Inductor Product and Services

9.17.4 Abracon Automotive Grade Chip Inductor Production, Price, Value, Gross

Margin and Market Share (2021-2026)

9.17.5 Abracon Recent Developments/Updates

9.17.6 Abracon Competitive Strengths & Weaknesses

9.18 Delta Electronics, Inc.

9.18.1 Delta Electronics, Inc. Details

9.18.2 Delta Electronics, Inc. Major Business

9.18.3 Delta Electronics, Inc. Automotive Grade Chip Inductor Product and Services

9.18.4 Delta Electronics, Inc. Automotive Grade Chip Inductor Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.18.5 Delta Electronics, Inc. Recent Developments/Updates

9.18.6 Delta Electronics, Inc. Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Automotive Grade Chip Inductor Industry Chain

10.2 Automotive Grade Chip Inductor Upstream Analysis

10.2.1 Automotive Grade Chip Inductor Core Raw Materials

10.2.2 Main Manufacturers of Automotive Grade Chip Inductor Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Automotive Grade Chip Inductor Production Mode

10.6 Automotive Grade Chip Inductor Procurement Model

10.7 Automotive Grade Chip Inductor Industry Sales Model and Sales Channels

10.7.1 Automotive Grade Chip Inductor Sales Model

10.7.2 Automotive Grade Chip Inductor Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Automotive Grade Chip Inductor Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Automotive Grade Chip Inductor Production Value by Region (2021-2026) & (USD Million)

Table 3. World Automotive Grade Chip Inductor Production Value by Region (2027-2032) & (USD Million)

Table 4. World Automotive Grade Chip Inductor Production Value Market Share by Region (2021-2026)

Table 5. World Automotive Grade Chip Inductor Production Value Market Share by Region (2027-2032)

Table 6. World Automotive Grade Chip Inductor Production by Region (2021-2026) & (K Units)

Table 7. World Automotive Grade Chip Inductor Production by Region (2027-2032) & (K Units)

Table 8. World Automotive Grade Chip Inductor Production Market Share by Region (2021-2026)

Table 9. World Automotive Grade Chip Inductor Production Market Share by Region (2027-2032)

Table 10. World Automotive Grade Chip Inductor Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World Automotive Grade Chip Inductor Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. Automotive Grade Chip Inductor Major Market Trends

Table 13. World Automotive Grade Chip Inductor Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Units)

Table 14. World Automotive Grade Chip Inductor Consumption by Region (2021-2026) & (K Units)

Table 15. World Automotive Grade Chip Inductor Consumption Forecast by Region (2027-2032) & (K Units)

Table 16. World Automotive Grade Chip Inductor Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Automotive Grade Chip Inductor Producers in 2025

Table 18. World Automotive Grade Chip Inductor Production by Manufacturer (2021-2026) & (K Units)

Table 19. Production Market Share of Key Automotive Grade Chip Inductor Producers in 2025

Table 20. World Automotive Grade Chip Inductor Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global Automotive Grade Chip Inductor Company Evaluation Quadrant

Table 22. World Automotive Grade Chip Inductor Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Automotive Grade Chip Inductor Production Site of Key Manufacturer

Table 24. Automotive Grade Chip Inductor Market: Company Product Type Footprint

Table 25. Automotive Grade Chip Inductor Market: Company Product Application Footprint

Table 26. Automotive Grade Chip Inductor Competitive Factors

Table 27. Automotive Grade Chip Inductor New Entrant and Capacity Expansion Plans

Table 28. Automotive Grade Chip Inductor Mergers & Acquisitions Activity

Table 29. United States VS China Automotive Grade Chip Inductor Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Automotive Grade Chip Inductor Production Comparison, (2021 & 2025 & 2032) & (K Units)

Table 31. United States VS China Automotive Grade Chip Inductor Consumption Comparison, (2021 & 2025 & 2032) & (K Units)

Table 32. United States Based Automotive Grade Chip Inductor Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Automotive Grade Chip Inductor Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Automotive Grade Chip Inductor Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Automotive Grade Chip Inductor Production (2021-2026) & (K Units)

Table 36. United States Based Manufacturers Automotive Grade Chip Inductor Production Market Share (2021-2026)

Table 37. China Based Automotive Grade Chip Inductor Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Automotive Grade Chip Inductor Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Automotive Grade Chip Inductor Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Automotive Grade Chip Inductor Production, (2021-2026) & (K Units)

Table 41. China Based Manufacturers Automotive Grade Chip Inductor Production Market Share (2021-2026)

Table 42. Rest of World Based Automotive Grade Chip Inductor Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Automotive Grade Chip Inductor Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Automotive Grade Chip Inductor Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Automotive Grade Chip Inductor Production, (2021-2026) & (K Units)

Table 46. Rest of World Based Manufacturers Automotive Grade Chip Inductor Production Market Share (2021-2026)

Table 47. World Automotive Grade Chip Inductor Production Value by Qualification Level, (USD Million), 2021 & 2025 & 2032

Table 48. World Automotive Grade Chip Inductor Production by Qualification Level (2021-2026) & (K Units)

Table 49. World Automotive Grade Chip Inductor Production by Qualification Level (2027-2032) & (K Units)

Table 50. World Automotive Grade Chip Inductor Production Value by Qualification Level (2021-2026) & (USD Million)

Table 51. World Automotive Grade Chip Inductor Production Value by Qualification Level (2027-2032) & (USD Million)

Table 52. World Automotive Grade Chip Inductor Average Price by Qualification Level (2021-2026) & (US\$/Unit)

Table 53. World Automotive Grade Chip Inductor Average Price by Qualification Level (2027-2032) & (US\$/Unit)

Table 54. World Automotive Grade Chip Inductor Production Value by Electrical Function, (USD Million), 2021 & 2025 & 2032

Table 55. World Automotive Grade Chip Inductor Production by Electrical Function (2021-2026) & (K Units)

Table 56. World Automotive Grade Chip Inductor Production by Electrical Function (2027-2032) & (K Units)

Table 57. World Automotive Grade Chip Inductor Production Value by Electrical Function (2021-2026) & (USD Million)

Table 58. World Automotive Grade Chip Inductor Production Value by Electrical Function (2027-2032) & (USD Million)

Table 59. World Automotive Grade Chip Inductor Average Price by Electrical Function (2021-2026) & (US\$/Unit)

Table 60. World Automotive Grade Chip Inductor Average Price by Electrical Function

(2027-2032) & (US\$/Unit)

Table 61. World Automotive Grade Chip Inductor Production Value by Product Construction, (USD Million), 2021 & 2025 & 2032

Table 62. World Automotive Grade Chip Inductor Production by Product Construction (2021-2026) & (K Units)

Table 63. World Automotive Grade Chip Inductor Production by Product Construction (2027-2032) & (K Units)

Table 64. World Automotive Grade Chip Inductor Production Value by Product Construction (2021-2026) & (USD Million)

Table 65. World Automotive Grade Chip Inductor Production Value by Product Construction (2027-2032) & (USD Million)

Table 66. World Automotive Grade Chip Inductor Average Price by Product Construction (2021-2026) & (US\$/Unit)

Table 67. World Automotive Grade Chip Inductor Average Price by Product Construction (2027-2032) & (US\$/Unit)

Table 68. World Automotive Grade Chip Inductor Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Automotive Grade Chip Inductor Production by Application (2021-2026) & (K Units)

Table 70. World Automotive Grade Chip Inductor Production by Application (2027-2032) & (K Units)

Table 71. World Automotive Grade Chip Inductor Production Value by Application (2021-2026) & (USD Million)

Table 72. World Automotive Grade Chip Inductor Production Value by Application (2027-2032) & (USD Million)

Table 73. World Automotive Grade Chip Inductor Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World Automotive Grade Chip Inductor Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. Murata Manufacturing Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 76. Murata Manufacturing Co., Ltd. Major Business

Table 77. Murata Manufacturing Co., Ltd. Automotive Grade Chip Inductor Product and Services

Table 78. Murata Manufacturing Co., Ltd. Automotive Grade Chip Inductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Murata Manufacturing Co., Ltd. Recent Developments/Updates

Table 80. Murata Manufacturing Co., Ltd. Competitive Strengths & Weaknesses

Table 81. TDK Corporation Basic Information, Manufacturing Base and Competitors

Table 82. TDK Corporation Major Business

Table 83. TDK Corporation Automotive Grade Chip Inductor Product and Services

Table 84. TDK Corporation Automotive Grade Chip Inductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. TDK Corporation Recent Developments/Updates

Table 86. TDK Corporation Competitive Strengths & Weaknesses

Table 87. Taiyo Yuden Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 88. Taiyo Yuden Co., Ltd. Major Business

Table 89. Taiyo Yuden Co., Ltd. Automotive Grade Chip Inductor Product and Services

Table 90. Taiyo Yuden Co., Ltd. Automotive Grade Chip Inductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Taiyo Yuden Co., Ltd. Recent Developments/Updates

Table 92. Taiyo Yuden Co., Ltd. Competitive Strengths & Weaknesses

Table 93. Panasonic Industry Basic Information, Manufacturing Base and Competitors

Table 94. Panasonic Industry Major Business

Table 95. Panasonic Industry Automotive Grade Chip Inductor Product and Services

Table 96. Panasonic Industry Automotive Grade Chip Inductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Panasonic Industry Recent Developments/Updates

Table 98. Panasonic Industry Competitive Strengths & Weaknesses

Table 99. Samsung Electro-Mechanics Basic Information, Manufacturing Base and Competitors

Table 100. Samsung Electro-Mechanics Major Business

Table 101. Samsung Electro-Mechanics Automotive Grade Chip Inductor Product and Services

Table 102. Samsung Electro-Mechanics Automotive Grade Chip Inductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Samsung Electro-Mechanics Recent Developments/Updates

Table 104. Samsung Electro-Mechanics Competitive Strengths & Weaknesses

Table 105. Bourns, Inc. Basic Information, Manufacturing Base and Competitors

Table 106. Bourns, Inc. Major Business

Table 107. Bourns, Inc. Automotive Grade Chip Inductor Product and Services

Table 108. Bourns, Inc. Automotive Grade Chip Inductor Production (K Units), Price

(US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Bourns, Inc. Recent Developments/Updates

Table 110. Bourns, Inc. Competitive Strengths & Weaknesses

Table 111. Vishay Intertechnology, Inc. Basic Information, Manufacturing Base and Competitors

Table 112. Vishay Intertechnology, Inc. Major Business

Table 113. Vishay Intertechnology, Inc. Automotive Grade Chip Inductor Product and Services

Table 114. Vishay Intertechnology, Inc. Automotive Grade Chip Inductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. Vishay Intertechnology, Inc. Recent Developments/Updates

Table 116. Vishay Intertechnology, Inc. Competitive Strengths & Weaknesses

Table 117. Coilcraft, Inc. Basic Information, Manufacturing Base and Competitors

Table 118. Coilcraft, Inc. Major Business

Table 119. Coilcraft, Inc. Automotive Grade Chip Inductor Product and Services

Table 120. Coilcraft, Inc. Automotive Grade Chip Inductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Coilcraft, Inc. Recent Developments/Updates

Table 122. Coilcraft, Inc. Competitive Strengths & Weaknesses

Table 123. Würth Elektronik eiSos Basic Information, Manufacturing Base and Competitors

Table 124. Würth Elektronik eiSos Major Business

Table 125. Würth Elektronik eiSos Automotive Grade Chip Inductor Product and Services

Table 126. Würth Elektronik eiSos Automotive Grade Chip Inductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. Würth Elektronik eiSos Recent Developments/Updates

Table 128. Würth Elektronik eiSos Competitive Strengths & Weaknesses

Table 129. Sumida Corporation Basic Information, Manufacturing Base and Competitors

Table 130. Sumida Corporation Major Business

Table 131. Sumida Corporation Automotive Grade Chip Inductor Product and Services

Table 132. Sumida Corporation Automotive Grade Chip Inductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Sumida Corporation Recent Developments/Updates

Table 134. Sumida Corporation Competitive Strengths & Weaknesses

Table 135. YAGEO Group Basic Information, Manufacturing Base and Competitors

Table 136. YAGEO Group Major Business

Table 137. YAGEO Group Automotive Grade Chip Inductor Product and Services

Table 138. YAGEO Group Automotive Grade Chip Inductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. YAGEO Group Recent Developments/Updates

Table 140. YAGEO Group Competitive Strengths & Weaknesses

Table 141. Shenzhen Sunlord Electronics Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 142. Shenzhen Sunlord Electronics Co., Ltd. Major Business

Table 143. Shenzhen Sunlord Electronics Co., Ltd. Automotive Grade Chip Inductor Product and Services

Table 144. Shenzhen Sunlord Electronics Co., Ltd. Automotive Grade Chip Inductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Shenzhen Sunlord Electronics Co., Ltd. Recent Developments/Updates

Table 146. Shenzhen Sunlord Electronics Co., Ltd. Competitive Strengths & Weaknesses

Table 147. Tai-Tech Advanced Electronics Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 148. Tai-Tech Advanced Electronics Co., Ltd. Major Business

Table 149. Tai-Tech Advanced Electronics Co., Ltd. Automotive Grade Chip Inductor Product and Services

Table 150. Tai-Tech Advanced Electronics Co., Ltd. Automotive Grade Chip Inductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Tai-Tech Advanced Electronics Co., Ltd. Recent Developments/Updates

Table 152. Tai-Tech Advanced Electronics Co., Ltd. Competitive Strengths & Weaknesses

Table 153. Feng-Jui Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 154. Feng-Jui Technology Co., Ltd. Major Business

Table 155. Feng-Jui Technology Co., Ltd. Automotive Grade Chip Inductor Product and Services

Table 156. Feng-Jui Technology Co., Ltd. Automotive Grade Chip Inductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. Feng-Jui Technology Co., Ltd. Recent Developments/Updates
Table 158. Feng-Jui Technology Co., Ltd. Competitive Strengths & Weaknesses
Table 159. Eaton Electronics Basic Information, Manufacturing Base and Competitors
Table 160. Eaton Electronics Major Business
Table 161. Eaton Electronics Automotive Grade Chip Inductor Product and Services
Table 162. Eaton Electronics Automotive Grade Chip Inductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 163. Eaton Electronics Recent Developments/Updates
Table 164. Eaton Electronics Competitive Strengths & Weaknesses
Table 165. KYOCERA AVX Basic Information, Manufacturing Base and Competitors
Table 166. KYOCERA AVX Major Business
Table 167. KYOCERA AVX Automotive Grade Chip Inductor Product and Services
Table 168. KYOCERA AVX Automotive Grade Chip Inductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 169. KYOCERA AVX Recent Developments/Updates
Table 170. KYOCERA AVX Competitive Strengths & Weaknesses
Table 171. Abracon Basic Information, Manufacturing Base and Competitors
Table 172. Abracon Major Business
Table 173. Abracon Automotive Grade Chip Inductor Product and Services
Table 174. Abracon Automotive Grade Chip Inductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 175. Abracon Recent Developments/Updates
Table 176. Abracon Competitive Strengths & Weaknesses
Table 177. Delta Electronics, Inc. Basic Information, Manufacturing Base and Competitors
Table 178. Delta Electronics, Inc. Major Business
Table 179. Delta Electronics, Inc. Automotive Grade Chip Inductor Product and Services
Table 180. Delta Electronics, Inc. Automotive Grade Chip Inductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 181. Delta Electronics, Inc. Recent Developments/Updates
Table 182. Delta Electronics, Inc. Competitive Strengths & Weaknesses
Table 183. Global Key Players of Automotive Grade Chip Inductor Upstream (Raw Materials)
Table 184. Global Automotive Grade Chip Inductor Typical Customers

Table 185. Automotive Grade Chip Inductor Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Automotive Grade Chip Inductor Picture

Figure 2. World Automotive Grade Chip Inductor Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Automotive Grade Chip Inductor Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Automotive Grade Chip Inductor Production (2021-2032) & (K Units)

Figure 5. World Automotive Grade Chip Inductor Average Price (2021-2032) & (US\$/Unit)

Figure 6. World Automotive Grade Chip Inductor Production Value Market Share by Region (2021-2032)

Figure 7. World Automotive Grade Chip Inductor Production Market Share by Region (2021-2032)

Figure 8. North America Automotive Grade Chip Inductor Production (2021-2032) & (K Units)

Figure 9. Europe Automotive Grade Chip Inductor Production (2021-2032) & (K Units)

Figure 10. China Automotive Grade Chip Inductor Production (2021-2032) & (K Units)

Figure 11. Japan Automotive Grade Chip Inductor Production (2021-2032) & (K Units)

Figure 12. South Korea Automotive Grade Chip Inductor Production (2021-2032) & (K Units)

Figure 13. Automotive Grade Chip Inductor Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World Automotive Grade Chip Inductor Consumption (2021-2032) & (K Units)

Figure 16. World Automotive Grade Chip Inductor Consumption Market Share by Region (2021-2032)

Figure 17. United States Automotive Grade Chip Inductor Consumption (2021-2032) & (K Units)

Figure 18. China Automotive Grade Chip Inductor Consumption (2021-2032) & (K Units)

Figure 19. Europe Automotive Grade Chip Inductor Consumption (2021-2032) & (K Units)

Figure 20. Japan Automotive Grade Chip Inductor Consumption (2021-2032) & (K Units)

Figure 21. South Korea Automotive Grade Chip Inductor Consumption (2021-2032) & (K Units)

Figure 22. ASEAN Automotive Grade Chip Inductor Consumption (2021-2032) & (K Units)

Figure 23. India Automotive Grade Chip Inductor Consumption (2021-2032) & (K Units)

Figure 24. Producer Shipments of Automotive Grade Chip Inductor by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for Automotive Grade Chip Inductor Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for Automotive Grade Chip Inductor Markets in 2025

Figure 27. United States VS China: Automotive Grade Chip Inductor Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Automotive Grade Chip Inductor Production Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: Automotive Grade Chip Inductor Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States Based Manufacturers Automotive Grade Chip Inductor Production Market Share 2025

Figure 31. China Based Manufacturers Automotive Grade Chip Inductor Production Market Share 2025

Figure 32. Rest of World Based Manufacturers Automotive Grade Chip Inductor Production Market Share 2025

Figure 33. World Automotive Grade Chip Inductor Production Value by Qualification Level, (USD Million), 2021 & 2025 & 2032

Figure 34. World Automotive Grade Chip Inductor Production Value Market Share by Qualification Level in 2025

Figure 35. AEC-Q200 Grade 0 Products

Figure 36. AEC-Q200 Grade 1 Products

Figure 37. AEC-Q200 Grade 2/3 Products

Figure 38. World Automotive Grade Chip Inductor Production Market Share by Qualification Level (2021-2032)

Figure 39. World Automotive Grade Chip Inductor Production Value Market Share by Qualification Level (2021-2032)

Figure 40. World Automotive Grade Chip Inductor Average Price by Qualification Level (2021-2032) & (US\$/Unit)

Figure 41. World Automotive Grade Chip Inductor Production Value by Electrical Function, (USD Million), 2021 & 2025 & 2032

Figure 42. World Automotive Grade Chip Inductor Production Value Market Share by Electrical Function in 2025

Figure 43. Power Storage Inductors

Figure 44. RF Matching Inductors

Figure 45. PoC Bias Inductors

Figure 46. Signal Filtering Inductors

Figure 47. High-current Choke Inductors

Figure 48. World Automotive Grade Chip Inductor Production Market Share by Electrical Function (2021-2032)

Figure 49. World Automotive Grade Chip Inductor Production Value Market Share by Electrical Function (2021-2032)

Figure 50. World Automotive Grade Chip Inductor Average Price by Electrical Function (2021-2032) & (US\$/Unit)

Figure 51. World Automotive Grade Chip Inductor Production Value by Product Construction, (USD Million), 2021 & 2025 & 2032

Figure 52. World Automotive Grade Chip Inductor Production Value Market Share by Product Construction in 2025

Figure 53. Multilayer Ceramic/Ferrite Chip Inductors

Figure 54. Ceramic-core Wire-wound Chip Inductors

Figure 55. Ferrite-core Shielded Power Chip Inductors

Figure 56. Molded Metal-composite SMD Power Inductors

Figure 57. Thin-film Chip Inductors

Figure 58. World Automotive Grade Chip Inductor Production Market Share by Product Construction (2021-2032)

Figure 59. World Automotive Grade Chip Inductor Production Value Market Share by Product Construction (2021-2032)

Figure 60. World Automotive Grade Chip Inductor Average Price by Product Construction (2021-2032) & (US\$/Unit)

Figure 61. World Automotive Grade Chip Inductor Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 62. World Automotive Grade Chip Inductor Production Value Market Share by Application in 2025

Figure 63. xEV Power Conversion and Battery Systems

Figure 64. ADAS and Autonomous Driving Electronics

Figure 65. Infotainment, Connectivity and RF

Figure 66. Body Electronics and Lighting

Figure 67. World Automotive Grade Chip Inductor Production Market Share by Application (2021-2032)

Figure 68. World Automotive Grade Chip Inductor Production Value Market Share by Application (2021-2032)

Figure 69. World Automotive Grade Chip Inductor Average Price by Application (2021-2032) & (US\$/Unit)

Figure 70. Automotive Grade Chip Inductor Industry Chain

Figure 71. Automotive Grade Chip Inductor Procurement Model

Figure 72. Automotive Grade Chip Inductor Sales Model

Figure 73. Automotive Grade Chip Inductor Sales Channels, Direct Sales, and Distribution

Figure 74. Methodology

Figure 75. Research Process and Data Source

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