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Global Infrared Thermal Detector Chip Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Infrared Thermal Detector Chip market size was valued at US$ 3272 million in 2025 and is forecast to a readjusted size of US$ 5649 million by 2032 with a CAGR of 8.2% during review period.

Infrared Thermal Detector Chip refers to semiconductor sensing devices that convert thermal infrared radiation emitted by a target into electrical signals for two-dimensional thermal imaging, temperature mapping, target recognition or radiometric analysis. The market primarily covers bare detector dies, hybridized infrared focal plane arrays, wafer-level or conventionally packaged detectors, detector dewar assemblies and integrated detector-cooler assemblies where the detector remains the core value component. Principal technology platforms comprise uncooled thermal detectors, represented by vanadium oxide and amorphous-silicon microbolometers and lower-resolution thermal arrays, and cooled photon detectors based on materials such as mercury cadmium telluride, indium antimonide and Type-II or strained-layer superlattices. Key specifications include spectral band, array format, pixel pitch, noise-equivalent temperature difference, detectivity, responsivity, operability, frame rate, dark current, operating temperature and package vacuum lifetime. Infrared Thermal Detector Chip products support defense and security imaging, industrial thermography, optical gas imaging, firefighting, automotive sensing, unmanned platforms, outdoor observation, spaceborne remote sensing and scientific imaging.

Key Findings

Cooled photon-detector FPAs and DDAs represented about 45% of 2025 market

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value

Uncooled microbolometer FPAs contributed about 43% of 2025 market value and the majority of unit shipments

The verified core supplier base comprises 19 parent-level or independent manufacturers

Commercial product roadmaps are moving toward 8–10 ?m pixels wafer-level packaging and HD-to-megapixel formats

North America and Europe lead high-value cooled supply while China is the most active uncooled capacity expansion center

Market Trends

The Infrared Thermal Detector Chip industry is moving simultaneously toward higher imaging performance and lower system-level cost. In the uncooled segment, smaller pixel pitches, higher array formats, wafer-level packaging and increased digital integration are reducing detector size and enabling more compact thermal modules. Commercial product roadmaps have progressed from 17 ?m and 12 ?m platforms toward 10 ?m and 8 ?m devices, while selected suppliers have introduced 6 ?m development platforms. These changes support HD and megapixel imaging without proportionally increasing die size, but they also raise requirements for thermal isolation, readout noise, optical design and wafer uniformity. In cooled detectors, development is focused on higher operating temperatures, reduced size, weight and power consumption, T2SL/SLS material platforms, larger formats and multispectral capability. Detector suppliers are also providing more standardized interfaces, calibration tools and integration software, allowing thermal-camera and system developers to shorten product-development cycles. The long-term direction is therefore not defined by resolution alone, but by the combined optimization of sensitivity, power consumption, manufacturability, packaging reliability and total system cost.

Market Dynamics

Drivers

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Demand is supported by the expansion of defense modernization, unmanned platforms, persistent surveillance, industrial condition monitoring, firefighting, optical gas imaging and embedded thermal sensing. Defense and aerospace programs require qualified detectors with high sensitivity, long-range performance and secure supply, sustaining the value of cooled FPAs and premium uncooled products. Commercial demand benefits from declining detector dimensions, more scalable packaging and broader availability of compact thermal modules. Investments in sovereign detector supply chains are also becoming an important driver, as governments and strategic customers seek to reduce dependence on externally controlled materials, fabrication and packaging capacity. European initiatives to develop a fully regional high-resolution detector supply chain illustrate the increasing strategic importance of local manufacturing and shared technology investment.

Restraints

Market expansion is constrained by high capital requirements, long process-development cycles and the difficulty of achieving stable yield across detector materials, MEMS structures, ROICs, hybridization and vacuum packaging. Cooled devices require additional dewar and cryogenic integration, which increases system cost, power consumption and maintenance complexity. Uncooled devices face continuing average selling price pressure as pixel pitches shrink and production volumes rise, making yield and packaging cost critical to profitability. Export licensing, dual-use controls and restrictions related to technical performance, end users and end applications can limit addressable markets and complicate cross-border supply. These constraints are particularly important for high-performance FPAs because design changes, alternative materials or changes in production location may require renewed qualification.

Opportunities

The largest incremental opportunities are emerging where thermal sensing can provide information that visible cameras cannot reliably capture. Automotive night perception, autonomous and remotely operated platforms, drones, robotics, compact outdoor equipment and distributed industrial monitoring offer attractive opportunities for smaller and lower-power uncooled detectors. Optical gas imaging and environmental monitoring support demand for detectors optimized around specific absorption bands, while space and scientific programs create opportunities for high-operability, multispectral and large-format cooled arrays. Further reductions in detector package size and system cost may also expand thermal imaging into smart buildings, appliances and other embedded

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applications. Commercial success will depend on whether suppliers can translate pixel and packaging advances into lower total integration cost rather than only improving laboratory-level detector specifications.

Challenges

The industry must manage a widening gap between demonstrating a detector and achieving repeatable, qualified mass production. New materials and smaller-pixel structures may offer strong theoretical performance, but commercialization requires consistent epitaxy or MEMS processing, low defect density, stable vacuum packages, uniform calibration and acceptable long-term reliability. Competition is also becoming more polarized: high-end cooled products remain qualification-driven and relatively concentrated, while uncooled products face faster price erosion and increasing pressure from vertically integrated suppliers. Differences in export classification, frame-rate restrictions, measurement conditions and product integration levels reduce comparability between suppliers. The absence of fully standardized reporting for detector shipments, average selling prices and detector-level revenue further increases uncertainty for customers and investors evaluating production scale and competitive position.

Industry Chain Analysis

The upstream chain for Infrared Thermal Detector Chip includes infrared-sensitive materials and epitaxial wafers, silicon and MEMS wafers, readout integrated circuits, specialty gases and chemicals, indium bumping materials, infrared windows, ceramic and metal packages, getter materials, vacuum equipment and cryogenic components. Uncooled microbolometers depend heavily on MEMS process control, thermal-isolation structures, ROIC design and vacuum packaging. Cooled photon detectors require additional expertise in compound-semiconductor material growth, detector-array processing, hybridization, dewar assembly and cooler integration. Capital equipment, process recipes and qualified raw materials create long supplier-validation cycles and limit the speed at which production can be transferred between facilities.

The midstream value-creation process comprises detector architecture design, material growth or MEMS fabrication, ROIC development, wafer processing, flip-chip hybridization, thinning, packaging, vacuum sealing, calibration, testing and reliability qualification. Downstream products include thermal-imaging cores, cameras, sights,

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seekers, surveillance payloads, industrial instruments, automotive sensing systems and spaceborne instruments. For uncooled products, cost and profit performance are strongly influenced by wafer yield, die area, package size and production scale. For cooled detectors, value is concentrated in material quality, detector performance, hybridization yield, dewar reliability and application qualification. The highest-value suppliers generally control several of these steps or maintain tightly managed manufacturing partnerships.

Segment Insights

By market value, cooled photon-detector FPAs and detector dewar assemblies represented approximately 45% of the 2025 market model, narrowly exceeding uncooled microbolometer FPAs at approximately 43%. Low-resolution thermal arrays represented about 8%, while specialized space, scientific and other detector packages accounted for the remaining approximately 4%. This value structure differs substantially from shipment structure: uncooled detectors contribute the majority of units because they serve higher-volume commercial and embedded applications, whereas cooled products generate substantially higher revenue per unit through their material, hybridization, dewar and qualification content.

Within uncooled detectors, VOx microbolometers form the principal commercial platform, and product differentiation increasingly depends on pixel pitch, format, NETD, frame rate, package architecture and digital interface. VGA-class products remain an important volume category, while HD and megapixel arrays are becoming more relevant for long-range observation, industrial detail recognition and premium outdoor systems. Within cooled detectors, MCT and InSb retain established positions, while T2SL/SLS is gaining attention for higher operating temperatures, material uniformity and supply-chain diversification. The most attractive technology opportunities are concentrated in platforms that can combine smaller size and lower power with stable manufacturing yield.

Downstream Market Opportunities

Defense and security remain the principal value anchors because guidance, targeting, border surveillance, counter-unmanned systems and airborne sensing require performance and qualification that cannot be replaced by low-cost imaging alone. Industrial thermography, predictive maintenance, electrical inspection, firefighting and optical gas imaging provide more diversified commercial demand and support repeat

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purchases of detector-enabled instruments. Automotive sensing, drones, robots and autonomous platforms offer significant long-term unit potential, particularly where thermal imaging complements visible cameras and radar in darkness, glare, smoke or adverse weather. Consumer, outdoor and smart-device applications can accelerate shipment growth, although they impose stronger requirements for low cost, small package size and power efficiency. The most attractive downstream opportunities will be those in which thermal sensing produces measurable safety, maintenance or operational benefits rather than functioning only as an additional imaging feature.

Regional Insights

North America and Europe together represent the highest-value concentration of cooled detector supply, supported by defense, aerospace, space and specialized industrial demand. North American production includes vertically integrated defense-group capabilities and specialist commercial detector platforms, while Europe maintains a diversified ecosystem spanning MCT, microbolometer and T2SL technologies. European investment is increasingly shaped by detector sovereignty, shared development programs and the need to maintain regional material, wafer and packaging capabilities. Israel holds a strategic position in cooled and uncooled military detectors, while South Korea has a smaller but established domestic production base.

China is the most active expansion center for scaled uncooled detector manufacturing and is increasing investment in smaller pixels, wafer-level packaging, T2SL and other photon-detector technologies. Product roadmaps now cover QVGA through megapixel-class arrays, and recent launches indicate that 8 ?m detectors are moving from technical demonstration toward broader production. Japan remains more prominent in low-resolution thermal arrays and specialized photodetectors than in the merchant high-resolution FPA market. Taiwan, Southeast Asia and India contain growing module, system and development activity, but their publicly verified commercial FPA manufacturing bases remain less extensive than those of North America, Europe and China.

Competitive Landscape Analysis

The verified Core Formal List contains 19 parent-level or independent manufacturers, reflecting the limited number of companies able to demonstrate sustained detector-chip, FPA or detector-level assembly production. Competition is more concentrated in cooled

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detectors because material growth, hybridization, dewar packaging and defense or space qualification create high entry barriers and long customer relationships. The uncooled segment has a broader supplier base, but large-scale competitiveness still depends on control of ROIC design, MEMS fabrication, vacuum packaging, calibration and downstream integration. Large diversified defense and technology groups benefit from captive programs, capital resources and qualification records; specialist European, Israeli, Korean and US suppliers compete through materials, spectral coverage or application-specific performance; and Chinese integrated manufacturers increasingly compete through manufacturing scale, cost, small-pixel development and access to expanding domestic applications. Emerging suppliers may broaden the market, particularly in T2SL and compact uncooled devices, but sample availability alone does not establish a sustainable competitive position. Future strategic differentiation will center on production yield, secure regional supply, qualification capacity, package reliability and the ability to reduce total system cost.

Report Scope

This report is a detailed and comprehensive analysis for global Infrared Thermal Detector Chip market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Infrared Thermal Detector Chip market size and forecasts, in consumption value ($ Million), sales quantity (Million Units), and average selling prices (US$/Unit), 2021-2032

Global Infrared Thermal Detector Chip market size and forecasts by region and country, in consumption value ($ Million), sales quantity (Million Units), and average selling prices (US$/Unit), 2021-2032

Global Infrared Thermal Detector Chip market size and forecasts, by Type and by Application, in consumption value ($ Million), sales quantity (Million Units), and average

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selling prices (US$/Unit), 2021-2032

Global Infrared Thermal Detector Chip market shares of main players, shipments in revenue ($ Million), sales quantity (Million Units), and ASP (US$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Infrared Thermal Detector Chip

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Infrared Thermal Detector Chip market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include RTX Corporation, BAE Systems plc, Leonardo S.p.A., L3Harris Technologies, Inc., Hangzhou Hikvision Digital Technology Co., Ltd., Teledyne Technologies Incorporated, Wuhan Guide Infrared Co., Ltd., Raytron Technology Co., Ltd., LYNRED, SCD SemiConductor Devices, etc.

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

Infrared Thermal Detector Chip market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market Segmentation

Market segment by Type

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Uncooled Thermal Imaging Detector

Cooled Thermal Imaging Detector

Other

Market segment by Detection Principle

Thermal Detector

Photon Detector

Market segment by Detector Material

Vanadium Oxide

Mercury Cadmium Telluride

Indium Antimonide

Type-II Superlattice

Other Detector Materials

Market segment by Array Format

VGA-class Array

HD-class Array

Megapixel and Larger Array

Other

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Market segment by Application

Thermal Measurement and Inspection

Surveillance and Observation

Targeting and Guidance

Optical Gas Imaging

Fire Detection and Rescue

Scientific and Space Imaging

Other Thermal Imaging Functions

Major players covered

RTX Corporation

BAE Systems plc

Leonardo S.p.A.

L3Harris Technologies, Inc.

Hangzhou Hikvision Digital Technology Co., Ltd.

Teledyne Technologies Incorporated

Wuhan Guide Infrared Co., Ltd.

Raytron Technology Co., Ltd.

LYNRED

SCD SemiConductor Devices

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Diehl Stiftung & Co. KG

i3system, Inc.

Zhejiang Dali Technology Co., Ltd.

Seek Thermal, Inc.

IRnova AB

VIGO Photonics S.A.

North GuangWei Technology INC.

Attollo Engineering, LLC

Zhejiang Kunteng Infrared Technology Co., Ltd.

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Infrared Thermal Detector Chip product scope, market overview, market estimation caveats and base year.

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Chapter 2, to profile the top manufacturers of Infrared Thermal Detector Chip, with price, sales quantity, revenue, and global market share of Infrared Thermal Detector Chip from 2021 to 2026.

Chapter 3, the Infrared Thermal Detector Chip competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Infrared Thermal Detector Chip breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and Infrared Thermal Detector Chip market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Infrared Thermal Detector Chip.

Chapter 14 and 15, to describe Infrared Thermal Detector Chip sales channel, distributors, customers, research findings and conclusion.

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Contents

1 MARKET OVERVIEW

1.1 Product Overview and Scope
1.2 Market Estimation Caveats and Base Year
1.3 Market Analysis by Type
  1.3.1 Overview: Global Infrared Thermal Detector Chip Consumption Value by Type: 2021 Versus 2025 Versus 2032
  1.3.2 Uncooled Thermal Imaging Detector
  1.3.3 Cooled Thermal Imaging Detector
  1.3.4 Other
1.4 Market Analysis by Detection Principle
  1.4.1 Overview: Global Infrared Thermal Detector Chip Consumption Value by Detection Principle: 2021 Versus 2025 Versus 2032
  1.4.2 Thermal Detector
  1.4.3 Photon Detector
1.5 Market Analysis by Detector Material
  1.5.1 Overview: Global Infrared Thermal Detector Chip Consumption Value by Detector Material: 2021 Versus 2025 Versus 2032
  1.5.2 Vanadium Oxide
  1.5.3 Mercury Cadmium Telluride
  1.5.4 Indium Antimonide
  1.5.5 Type-II Superlattice
  1.5.6 Other Detector Materials
1.6 Market Analysis by Array Format
  1.6.1 Overview: Global Infrared Thermal Detector Chip Consumption Value by Array Format: 2021 Versus 2025 Versus 2032
  1.6.2 VGA-class Array
  1.6.3 HD-class Array
  1.6.4 Megapixel and Larger Array
  1.6.5 Other
1.7 Market Analysis by Application
  1.7.1 Overview: Global Infrared Thermal Detector Chip Consumption Value by Application: 2021 Versus 2025 Versus 2032
  1.7.2 Thermal Measurement and Inspection
  1.7.3 Surveillance and Observation
  1.7.4 Targeting and Guidance
  1.7.5 Optical Gas Imaging

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1.7.6 Fire Detection and Rescue
1.7.7 Scientific and Space Imaging
1.7.8 Other Thermal Imaging Functions
1.8 Global Infrared Thermal Detector Chip Market Size & Forecast
1.8.1 Global Infrared Thermal Detector Chip Consumption Value (2021 & 2025 & 2032)
1.8.2 Global Infrared Thermal Detector Chip Sales Quantity (2021-2032)
1.8.3 Global Infrared Thermal Detector Chip Average Price (2021-2032)

2 MANUFACTURERS PROFILES

2.1 RTX Corporation
2.1.1 RTX Corporation Details
2.1.2 RTX Corporation Major Business
2.1.3 RTX Corporation Infrared Thermal Detector Chip Product and Services
2.1.4 RTX Corporation Infrared Thermal Detector Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.1.5 RTX Corporation Recent Developments/Updates
2.2 BAE Systems plc
2.2.1 BAE Systems plc Details
2.2.2 BAE Systems plc Major Business
2.2.3 BAE Systems plc Infrared Thermal Detector Chip Product and Services
2.2.4 BAE Systems plc Infrared Thermal Detector Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.2.5 BAE Systems plc Recent Developments/Updates
2.3 Leonardo S.p.A.
2.3.1 Leonardo S.p.A. Details
2.3.2 Leonardo S.p.A. Major Business
2.3.3 Leonardo S.p.A. Infrared Thermal Detector Chip Product and Services
2.3.4 Leonardo S.p.A. Infrared Thermal Detector Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.3.5 Leonardo S.p.A. Recent Developments/Updates
2.4 L3Harris Technologies, Inc.
2.4.1 L3Harris Technologies, Inc. Details
2.4.2 L3Harris Technologies, Inc. Major Business
2.4.3 L3Harris Technologies, Inc. Infrared Thermal Detector Chip Product and Services
2.4.4 L3Harris Technologies, Inc. Infrared Thermal Detector Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

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2.4.5 L3Harris Technologies, Inc. Recent Developments/Updates
2.5 Hangzhou Hikvision Digital Technology Co., Ltd.
2.5.1 Hangzhou Hikvision Digital Technology Co., Ltd. Details
2.5.2 Hangzhou Hikvision Digital Technology Co., Ltd. Major Business
2.5.3 Hangzhou Hikvision Digital Technology Co., Ltd. Infrared Thermal Detector Chip Product and Services
2.5.4 Hangzhou Hikvision Digital Technology Co., Ltd. Infrared Thermal Detector Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.5.5 Hangzhou Hikvision Digital Technology Co., Ltd. Recent Developments/Updates
2.6 Teledyne Technologies Incorporated
2.6.1 Teledyne Technologies Incorporated Details
2.6.2 Teledyne Technologies Incorporated Major Business
2.6.3 Teledyne Technologies Incorporated Infrared Thermal Detector Chip Product and Services
2.6.4 Teledyne Technologies Incorporated Infrared Thermal Detector Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.6.5 Teledyne Technologies Incorporated Recent Developments/Updates
2.7 Wuhan Guide Infrared Co., Ltd.
2.7.1 Wuhan Guide Infrared Co., Ltd. Details
2.7.2 Wuhan Guide Infrared Co., Ltd. Major Business
2.7.3 Wuhan Guide Infrared Co., Ltd. Infrared Thermal Detector Chip Product and Services
2.7.4 Wuhan Guide Infrared Co., Ltd. Infrared Thermal Detector Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.7.5 Wuhan Guide Infrared Co., Ltd. Recent Developments/Updates
2.8 Raytron Technology Co., Ltd.
2.8.1 Raytron Technology Co., Ltd. Details
2.8.2 Raytron Technology Co., Ltd. Major Business
2.8.3 Raytron Technology Co., Ltd. Infrared Thermal Detector Chip Product and Services
2.8.4 Raytron Technology Co., Ltd. Infrared Thermal Detector Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.8.5 Raytron Technology Co., Ltd. Recent Developments/Updates
2.9 LYNRED
2.9.1 LYNRED Details
2.9.2 LYNRED Major Business
2.9.3 LYNRED Infrared Thermal Detector Chip Product and Services
2.9.4 LYNRED Infrared Thermal Detector Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

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info@marketpublishers.com

2.9.5 LYNRED Recent Developments/Updates
2.10 SCD SemiConductor Devices
2.10.1 SCD SemiConductor Devices Details
2.10.2 SCD SemiConductor Devices Major Business
2.10.3 SCD SemiConductor Devices Infrared Thermal Detector Chip Product and Services
2.10.4 SCD SemiConductor Devices Infrared Thermal Detector Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.10.5 SCD SemiConductor Devices Recent Developments/Updates
2.11 Diehl Stiftung & Co. KG
2.11.1 Diehl Stiftung & Co. KG Details
2.11.2 Diehl Stiftung & Co. KG Major Business
2.11.3 Diehl Stiftung & Co. KG Infrared Thermal Detector Chip Product and Services
2.11.4 Diehl Stiftung & Co. KG Infrared Thermal Detector Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.11.5 Diehl Stiftung & Co. KG Recent Developments/Updates
2.12 i3system, Inc.
2.12.1 i3system, Inc. Details
2.12.2 i3system, Inc. Major Business
2.12.3 i3system, Inc. Infrared Thermal Detector Chip Product and Services
2.12.4 i3system, Inc. Infrared Thermal Detector Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.12.5 i3system, Inc. Recent Developments/Updates
2.13 Zhejiang Dali Technology Co., Ltd.
2.13.1 Zhejiang Dali Technology Co., Ltd. Details
2.13.2 Zhejiang Dali Technology Co., Ltd. Major Business
2.13.3 Zhejiang Dali Technology Co., Ltd. Infrared Thermal Detector Chip Product and Services
2.13.4 Zhejiang Dali Technology Co., Ltd. Infrared Thermal Detector Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.13.5 Zhejiang Dali Technology Co., Ltd. Recent Developments/Updates
2.14 Seek Thermal, Inc.
2.14.1 Seek Thermal, Inc. Details
2.14.2 Seek Thermal, Inc. Major Business
2.14.3 Seek Thermal, Inc. Infrared Thermal Detector Chip Product and Services
2.14.4 Seek Thermal, Inc. Infrared Thermal Detector Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.14.5 Seek Thermal, Inc. Recent Developments/Updates
2.15 IRnova AB

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2.15.1 IRnova AB Details
2.15.2 IRnova AB Major Business
2.15.3 IRnova AB Infrared Thermal Detector Chip Product and Services
2.15.4 IRnova AB Infrared Thermal Detector Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.15.5 IRnova AB Recent Developments/Updates
2.16 VIGO Photonics S.A.
2.16.1 VIGO Photonics S.A. Details
2.16.2 VIGO Photonics S.A. Major Business
2.16.3 VIGO Photonics S.A. Infrared Thermal Detector Chip Product and Services
2.16.4 VIGO Photonics S.A. Infrared Thermal Detector Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.16.5 VIGO Photonics S.A. Recent Developments/Updates
2.17 North GuangWei Technology INC.
2.17.1 North GuangWei Technology INC. Details
2.17.2 North GuangWei Technology INC. Major Business
2.17.3 North GuangWei Technology INC. Infrared Thermal Detector Chip Product and Services
2.17.4 North GuangWei Technology INC. Infrared Thermal Detector Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.17.5 North GuangWei Technology INC. Recent Developments/Updates
2.18 Attollo Engineering, LLC
2.18.1 Attollo Engineering, LLC Details
2.18.2 Attollo Engineering, LLC Major Business
2.18.3 Attollo Engineering, LLC Infrared Thermal Detector Chip Product and Services
2.18.4 Attollo Engineering, LLC Infrared Thermal Detector Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.18.5 Attollo Engineering, LLC Recent Developments/Updates
2.19 Zhejiang Kunteng Infrared Technology Co., Ltd.
2.19.1 Zhejiang Kunteng Infrared Technology Co., Ltd. Details
2.19.2 Zhejiang Kunteng Infrared Technology Co., Ltd. Major Business
2.19.3 Zhejiang Kunteng Infrared Technology Co., Ltd. Infrared Thermal Detector Chip Product and Services
2.19.4 Zhejiang Kunteng Infrared Technology Co., Ltd. Infrared Thermal Detector Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.19.5 Zhejiang Kunteng Infrared Technology Co., Ltd. Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: INFRARED THERMAL DETECTOR CHIP BY MANUFACTURER

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3.1 Global Infrared Thermal Detector Chip Sales Quantity by Manufacturer (2021-2026)
3.2 Global Infrared Thermal Detector Chip Revenue by Manufacturer (2021-2026)
3.3 Global Infrared Thermal Detector Chip Average Price by Manufacturer (2021-2026)
3.4 Market Share Analysis (2025)
3.4.1 Producer Shipments of Infrared Thermal Detector Chip by Manufacturer Revenue ($MM) and Market Share (%): 2025
3.4.2 Top 3 Infrared Thermal Detector Chip Manufacturer Market Share in 2025
3.4.3 Top 6 Infrared Thermal Detector Chip Manufacturer Market Share in 2025
3.5 Infrared Thermal Detector Chip Market: Overall Company Footprint Analysis
3.5.1 Infrared Thermal Detector Chip Market: Region Footprint
3.5.2 Infrared Thermal Detector Chip Market: Company Product Type Footprint
3.5.3 Infrared Thermal Detector Chip Market: Company Product Application Footprint
3.6 New Market Entrants and Barriers to Market Entry
3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

4.1 Global Infrared Thermal Detector Chip Market Size by Region
4.1.1 Global Infrared Thermal Detector Chip Sales Quantity by Region (2021-2032)
4.1.2 Global Infrared Thermal Detector Chip Consumption Value by Region (2021-2032)
4.1.3 Global Infrared Thermal Detector Chip Average Price by Region (2021-2032)
4.2 North America Infrared Thermal Detector Chip Consumption Value (2021-2032)
4.3 Europe Infrared Thermal Detector Chip Consumption Value (2021-2032)
4.4 Asia-Pacific Infrared Thermal Detector Chip Consumption Value (2021-2032)
4.5 South America Infrared Thermal Detector Chip Consumption Value (2021-2032)
4.6 Middle East & Africa Infrared Thermal Detector Chip Consumption Value (2021-2032)

5 MARKET SEGMENT BY TYPE

5.1 Global Infrared Thermal Detector Chip Sales Quantity by Type (2021-2032)
5.2 Global Infrared Thermal Detector Chip Consumption Value by Type (2021-2032)
5.3 Global Infrared Thermal Detector Chip Average Price by Type (2021-2032)

6 MARKET SEGMENT BY APPLICATION

6.1 Global Infrared Thermal Detector Chip Sales Quantity by Application (2021-2032)

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6.2 Global Infrared Thermal Detector Chip Consumption Value by Application (2021-2032)
6.3 Global Infrared Thermal Detector Chip Average Price by Application (2021-2032)

7 NORTH AMERICA

7.1 North America Infrared Thermal Detector Chip Sales Quantity by Type (2021-2032)
7.2 North America Infrared Thermal Detector Chip Sales Quantity by Application (2021-2032)
7.3 North America Infrared Thermal Detector Chip Market Size by Country
  7.3.1 North America Infrared Thermal Detector Chip Sales Quantity by Country (2021-2032)
  7.3.2 North America Infrared Thermal Detector Chip Consumption Value by Country (2021-2032)
  7.3.3 United States Market Size and Forecast (2021-2032)
  7.3.4 Canada Market Size and Forecast (2021-2032)
  7.3.5 Mexico Market Size and Forecast (2021-2032)

8 EUROPE

8.1 Europe Infrared Thermal Detector Chip Sales Quantity by Type (2021-2032)
8.2 Europe Infrared Thermal Detector Chip Sales Quantity by Application (2021-2032)
8.3 Europe Infrared Thermal Detector Chip Market Size by Country
  8.3.1 Europe Infrared Thermal Detector Chip Sales Quantity by Country (2021-2032)
  8.3.2 Europe Infrared Thermal Detector Chip Consumption Value by Country (2021-2032)
  8.3.3 Germany Market Size and Forecast (2021-2032)
  8.3.4 France Market Size and Forecast (2021-2032)
  8.3.5 United Kingdom Market Size and Forecast (2021-2032)
  8.3.6 Russia Market Size and Forecast (2021-2032)
  8.3.7 Italy Market Size and Forecast (2021-2032)

9 ASIA-PACIFIC

9.1 Asia-Pacific Infrared Thermal Detector Chip Sales Quantity by Type (2021-2032)
9.2 Asia-Pacific Infrared Thermal Detector Chip Sales Quantity by Application (2021-2032)
9.3 Asia-Pacific Infrared Thermal Detector Chip Market Size by Region
  9.3.1 Asia-Pacific Infrared Thermal Detector Chip Sales Quantity by Region

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(2021-2032)
9.3.2 Asia-Pacific Infrared Thermal Detector Chip Consumption Value by Region (2021-2032)
9.3.3 China Market Size and Forecast (2021-2032)
9.3.4 Japan Market Size and Forecast (2021-2032)
9.3.5 South Korea Market Size and Forecast (2021-2032)
9.3.6 India Market Size and Forecast (2021-2032)
9.3.7 Southeast Asia Market Size and Forecast (2021-2032)
9.3.8 Australia Market Size and Forecast (2021-2032)

10 SOUTH AMERICA

10.1 South America Infrared Thermal Detector Chip Sales Quantity by Type (2021-2032)
10.2 South America Infrared Thermal Detector Chip Sales Quantity by Application (2021-2032)
10.3 South America Infrared Thermal Detector Chip Market Size by Country
10.3.1 South America Infrared Thermal Detector Chip Sales Quantity by Country (2021-2032)
10.3.2 South America Infrared Thermal Detector Chip Consumption Value by Country (2021-2032)
10.3.3 Brazil Market Size and Forecast (2021-2032)
10.3.4 Argentina Market Size and Forecast (2021-2032)

11 MIDDLE EAST & AFRICA

11.1 Middle East & Africa Infrared Thermal Detector Chip Sales Quantity by Type (2021-2032)
11.2 Middle East & Africa Infrared Thermal Detector Chip Sales Quantity by Application (2021-2032)
11.3 Middle East & Africa Infrared Thermal Detector Chip Market Size by Country
11.3.1 Middle East & Africa Infrared Thermal Detector Chip Sales Quantity by Country (2021-2032)
11.3.2 Middle East & Africa Infrared Thermal Detector Chip Consumption Value by Country (2021-2032)
11.3.3 Turkey Market Size and Forecast (2021-2032)
11.3.4 Egypt Market Size and Forecast (2021-2032)
11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)
11.3.6 South Africa Market Size and Forecast (2021-2032)

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12 MARKET DYNAMICS

12.1 Infrared Thermal Detector Chip Market Drivers
12.2 Infrared Thermal Detector Chip Market Restraints
12.3 Infrared Thermal Detector Chip Trends Analysis
12.4 Porters Five Forces Analysis
  12.4.1 Threat of New Entrants
  12.4.2 Bargaining Power of Suppliers
  12.4.3 Bargaining Power of Buyers
  12.4.4 Threat of Substitutes
  12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

13.1 Raw Material of Infrared Thermal Detector Chip and Key Manufacturers
13.2 Manufacturing Costs Percentage of Infrared Thermal Detector Chip
13.3 Infrared Thermal Detector Chip Production Process
13.4 Industry Value Chain Analysis

14 SHIPMENTS BY DISTRIBUTION CHANNEL

14.1 Sales Channel
  14.1.1 Direct to End-User
  14.1.2 Distributors
14.2 Infrared Thermal Detector Chip Typical Distributors
14.3 Infrared Thermal Detector Chip Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

16.1 Methodology
16.2 Research Process and Data Source
16.3 Disclaimer

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List Of Tables

LIST OF TABLES

Table 1. Global Infrared Thermal Detector Chip Consumption Value by Type, (USD Million), 2021 & 2025 & 2032
Table 2. Global Infrared Thermal Detector Chip Consumption Value by Detection Principle, (USD Million), 2021 & 2025 & 2032
Table 3. Global Infrared Thermal Detector Chip Consumption Value by Detector Material, (USD Million), 2021 & 2025 & 2032
Table 4. Global Infrared Thermal Detector Chip Consumption Value by Array Format, (USD Million), 2021 & 2025 & 2032
Table 5. Global Infrared Thermal Detector Chip Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
Table 6. RTX Corporation Basic Information, Manufacturing Base and Competitors
Table 7. RTX Corporation Major Business
Table 8. RTX Corporation Infrared Thermal Detector Chip Product and Services
Table 9. RTX Corporation Infrared Thermal Detector Chip Sales Quantity (Million Units), Average Price (US$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 10. RTX Corporation Recent Developments/Updates
Table 11. BAE Systems plc Basic Information, Manufacturing Base and Competitors
Table 12. BAE Systems plc Major Business
Table 13. BAE Systems plc Infrared Thermal Detector Chip Product and Services
Table 14. BAE Systems plc Infrared Thermal Detector Chip Sales Quantity (Million Units), Average Price (US$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 15. BAE Systems plc Recent Developments/Updates
Table 16. Leonardo S.p.A. Basic Information, Manufacturing Base and Competitors
Table 17. Leonardo S.p.A. Major Business
Table 18. Leonardo S.p.A. Infrared Thermal Detector Chip Product and Services
Table 19. Leonardo S.p.A. Infrared Thermal Detector Chip Sales Quantity (Million Units), Average Price (US$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 20. Leonardo S.p.A. Recent Developments/Updates
Table 21. L3Harris Technologies, Inc. Basic Information, Manufacturing Base and Competitors
Table 22. L3Harris Technologies, Inc. Major Business
Table 23. L3Harris Technologies, Inc. Infrared Thermal Detector Chip Product and

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Services
Table 24. L3Harris Technologies, Inc. Infrared Thermal Detector Chip Sales Quantity (Million Units), Average Price (US$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 25. L3Harris Technologies, Inc. Recent Developments/Updates
Table 26. Hangzhou Hikvision Digital Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 27. Hangzhou Hikvision Digital Technology Co., Ltd. Major Business
Table 28. Hangzhou Hikvision Digital Technology Co., Ltd. Infrared Thermal Detector Chip Product and Services
Table 29. Hangzhou Hikvision Digital Technology Co., Ltd. Infrared Thermal Detector Chip Sales Quantity (Million Units), Average Price (US$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 30. Hangzhou Hikvision Digital Technology Co., Ltd. Recent Developments/Updates
Table 31. Teledyne Technologies Incorporated Basic Information, Manufacturing Base and Competitors
Table 32. Teledyne Technologies Incorporated Major Business
Table 33. Teledyne Technologies Incorporated Infrared Thermal Detector Chip Product and Services
Table 34. Teledyne Technologies Incorporated Infrared Thermal Detector Chip Sales Quantity (Million Units), Average Price (US$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 35. Teledyne Technologies Incorporated Recent Developments/Updates
Table 36. Wuhan Guide Infrared Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 37. Wuhan Guide Infrared Co., Ltd. Major Business
Table 38. Wuhan Guide Infrared Co., Ltd. Infrared Thermal Detector Chip Product and Services
Table 39. Wuhan Guide Infrared Co., Ltd. Infrared Thermal Detector Chip Sales Quantity (Million Units), Average Price (US$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 40. Wuhan Guide Infrared Co., Ltd. Recent Developments/Updates
Table 41. Raytron Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 42. Raytron Technology Co., Ltd. Major Business
Table 43. Raytron Technology Co., Ltd. Infrared Thermal Detector Chip Product and Services
Table 44. Raytron Technology Co., Ltd. Infrared Thermal Detector Chip Sales Quantity

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(Million Units), Average Price (US$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 45. Raytron Technology Co., Ltd. Recent Developments/Updates
Table 46. LYNRED Basic Information, Manufacturing Base and Competitors
Table 47. LYNRED Major Business
Table 48. LYNRED Infrared Thermal Detector Chip Product and Services
Table 49. LYNRED Infrared Thermal Detector Chip Sales Quantity (Million Units), Average Price (US$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 50. LYNRED Recent Developments/Updates
Table 51. SCD SemiConductor Devices Basic Information, Manufacturing Base and Competitors
Table 52. SCD SemiConductor Devices Major Business
Table 53. SCD SemiConductor Devices Infrared Thermal Detector Chip Product and Services
Table 54. SCD SemiConductor Devices Infrared Thermal Detector Chip Sales Quantity (Million Units), Average Price (US$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 55. SCD SemiConductor Devices Recent Developments/Updates
Table 56. Diehl Stiftung & Co. KG Basic Information, Manufacturing Base and Competitors
Table 57. Diehl Stiftung & Co. KG Major Business
Table 58. Diehl Stiftung & Co. KG Infrared Thermal Detector Chip Product and Services
Table 59. Diehl Stiftung & Co. KG Infrared Thermal Detector Chip Sales Quantity (Million Units), Average Price (US$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 60. Diehl Stiftung & Co. KG Recent Developments/Updates
Table 61. i3system, Inc. Basic Information, Manufacturing Base and Competitors
Table 62. i3system, Inc. Major Business
Table 63. i3system, Inc. Infrared Thermal Detector Chip Product and Services
Table 64. i3system, Inc. Infrared Thermal Detector Chip Sales Quantity (Million Units), Average Price (US$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 65. i3system, Inc. Recent Developments/Updates
Table 66. Zhejiang Dali Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 67. Zhejiang Dali Technology Co., Ltd. Major Business
Table 68. Zhejiang Dali Technology Co., Ltd. Infrared Thermal Detector Chip Product and Services

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Table 69. Zhejiang Dali Technology Co., Ltd. Infrared Thermal Detector Chip Sales Quantity (Million Units), Average Price (US$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 70. Zhejiang Dali Technology Co., Ltd. Recent Developments/Updates
Table 71. Seek Thermal, Inc. Basic Information, Manufacturing Base and Competitors
Table 72. Seek Thermal, Inc. Major Business
Table 73. Seek Thermal, Inc. Infrared Thermal Detector Chip Product and Services
Table 74. Seek Thermal, Inc. Infrared Thermal Detector Chip Sales Quantity (Million Units), Average Price (US$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 75. Seek Thermal, Inc. Recent Developments/Updates
Table 76. IRnova AB Basic Information, Manufacturing Base and Competitors
Table 77. IRnova AB Major Business
Table 78. IRnova AB Infrared Thermal Detector Chip Product and Services
Table 79. IRnova AB Infrared Thermal Detector Chip Sales Quantity (Million Units), Average Price (US$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 80. IRnova AB Recent Developments/Updates
Table 81. VIGO Photonics S.A. Basic Information, Manufacturing Base and Competitors
Table 82. VIGO Photonics S.A. Major Business
Table 83. VIGO Photonics S.A. Infrared Thermal Detector Chip Product and Services
Table 84. VIGO Photonics S.A. Infrared Thermal Detector Chip Sales Quantity (Million Units), Average Price (US$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 85. VIGO Photonics S.A. Recent Developments/Updates
Table 86. North GuangWei Technology INC. Basic Information, Manufacturing Base and Competitors
Table 87. North GuangWei Technology INC. Major Business
Table 88. North GuangWei Technology INC. Infrared Thermal Detector Chip Product and Services
Table 89. North GuangWei Technology INC. Infrared Thermal Detector Chip Sales Quantity (Million Units), Average Price (US$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 90. North GuangWei Technology INC. Recent Developments/Updates
Table 91. Attollo Engineering, LLC Basic Information, Manufacturing Base and Competitors
Table 92. Attollo Engineering, LLC Major Business
Table 93. Attollo Engineering, LLC Infrared Thermal Detector Chip Product and Services

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Table 94. Attollo Engineering, LLC Infrared Thermal Detector Chip Sales Quantity (Million Units), Average Price (US$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 95. Attollo Engineering, LLC Recent Developments/Updates
Table 96. Zhejiang Kunteng Infrared Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 97. Zhejiang Kunteng Infrared Technology Co., Ltd. Major Business
Table 98. Zhejiang Kunteng Infrared Technology Co., Ltd. Infrared Thermal Detector Chip Product and Services
Table 99. Zhejiang Kunteng Infrared Technology Co., Ltd. Infrared Thermal Detector Chip Sales Quantity (Million Units), Average Price (US$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 100. Zhejiang Kunteng Infrared Technology Co., Ltd. Recent Developments/Updates
Table 101. Global Infrared Thermal Detector Chip Sales Quantity by Manufacturer (2021-2026) & (Million Units)
Table 102. Global Infrared Thermal Detector Chip Revenue by Manufacturer (2021-2026) & (USD Million)
Table 103. Global Infrared Thermal Detector Chip Average Price by Manufacturer (2021-2026) & (US$/Unit)
Table 104. Market Position of Manufacturers in Infrared Thermal Detector Chip, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025
Table 105. Head Office and Infrared Thermal Detector Chip Production Site of Key Manufacturer
Table 106. Infrared Thermal Detector Chip Market: Company Product Type Footprint
Table 107. Infrared Thermal Detector Chip Market: Company Product Application Footprint
Table 108. Infrared Thermal Detector Chip New Market Entrants and Barriers to Market Entry
Table 109. Infrared Thermal Detector Chip Mergers, Acquisition, Agreements, and Collaborations
Table 110. Global Infrared Thermal Detector Chip Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR
Table 111. Global Infrared Thermal Detector Chip Sales Quantity by Region (2021-2026) & (Million Units)
Table 112. Global Infrared Thermal Detector Chip Sales Quantity by Region (2027-2032) & (Million Units)
Table 113. Global Infrared Thermal Detector Chip Consumption Value by Region (2021-2026) & (USD Million)

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Table 114. Global Infrared Thermal Detector Chip Consumption Value by Region (2027-2032) & (USD Million)
Table 115. Global Infrared Thermal Detector Chip Average Price by Region (2021-2026) & (US$/Unit)
Table 116. Global Infrared Thermal Detector Chip Average Price by Region (2027-2032) & (US$/Unit)
Table 117. Global Infrared Thermal Detector Chip Sales Quantity by Type (2021-2026) & (Million Units)
Table 118. Global Infrared Thermal Detector Chip Sales Quantity by Type (2027-2032) & (Million Units)
Table 119. Global Infrared Thermal Detector Chip Consumption Value by Type (2021-2026) & (USD Million)
Table 120. Global Infrared Thermal Detector Chip Consumption Value by Type (2027-2032) & (USD Million)
Table 121. Global Infrared Thermal Detector Chip Average Price by Type (2021-2026) & (US$/Unit)
Table 122. Global Infrared Thermal Detector Chip Average Price by Type (2027-2032) & (US$/Unit)
Table 123. Global Infrared Thermal Detector Chip Sales Quantity by Application (2021-2026) & (Million Units)
Table 124. Global Infrared Thermal Detector Chip Sales Quantity by Application (2027-2032) & (Million Units)
Table 125. Global Infrared Thermal Detector Chip Consumption Value by Application (2021-2026) & (USD Million)
Table 126. Global Infrared Thermal Detector Chip Consumption Value by Application (2027-2032) & (USD Million)
Table 127. Global Infrared Thermal Detector Chip Average Price by Application (2021-2026) & (US$/Unit)
Table 128. Global Infrared Thermal Detector Chip Average Price by Application (2027-2032) & (US$/Unit)
Table 129. North America Infrared Thermal Detector Chip Sales Quantity by Type (2021-2026) & (Million Units)
Table 130. North America Infrared Thermal Detector Chip Sales Quantity by Type (2027-2032) & (Million Units)
Table 131. North America Infrared Thermal Detector Chip Sales Quantity by Application (2021-2026) & (Million Units)
Table 132. North America Infrared Thermal Detector Chip Sales Quantity by Application (2027-2032) & (Million Units)
Table 133. North America Infrared Thermal Detector Chip Sales Quantity by Country

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(2021-2026) & (Million Units)
Table 134. North America Infrared Thermal Detector Chip Sales Quantity by Country (2027-2032) & (Million Units)
Table 135. North America Infrared Thermal Detector Chip Consumption Value by Country (2021-2026) & (USD Million)
Table 136. North America Infrared Thermal Detector Chip Consumption Value by Country (2027-2032) & (USD Million)
Table 137. Europe Infrared Thermal Detector Chip Sales Quantity by Type (2021-2026) & (Million Units)
Table 138. Europe Infrared Thermal Detector Chip Sales Quantity by Type (2027-2032) & (Million Units)
Table 139. Europe Infrared Thermal Detector Chip Sales Quantity by Application (2021-2026) & (Million Units)
Table 140. Europe Infrared Thermal Detector Chip Sales Quantity by Application (2027-2032) & (Million Units)
Table 141. Europe Infrared Thermal Detector Chip Sales Quantity by Country (2021-2026) & (Million Units)
Table 142. Europe Infrared Thermal Detector Chip Sales Quantity by Country (2027-2032) & (Million Units)
Table 143. Europe Infrared Thermal Detector Chip Consumption Value by Country (2021-2026) & (USD Million)
Table 144. Europe Infrared Thermal Detector Chip Consumption Value by Country (2027-2032) & (USD Million)
Table 145. Asia-Pacific Infrared Thermal Detector Chip Sales Quantity by Type (2021-2026) & (Million Units)
Table 146. Asia-Pacific Infrared Thermal Detector Chip Sales Quantity by Type (2027-2032) & (Million Units)
Table 147. Asia-Pacific Infrared Thermal Detector Chip Sales Quantity by Application (2021-2026) & (Million Units)
Table 148. Asia-Pacific Infrared Thermal Detector Chip Sales Quantity by Application (2027-2032) & (Million Units)
Table 149. Asia-Pacific Infrared Thermal Detector Chip Sales Quantity by Region (2021-2026) & (Million Units)
Table 150. Asia-Pacific Infrared Thermal Detector Chip Sales Quantity by Region (2027-2032) & (Million Units)
Table 151. Asia-Pacific Infrared Thermal Detector Chip Consumption Value by Region (2021-2026) & (USD Million)
Table 152. Asia-Pacific Infrared Thermal Detector Chip Consumption Value by Region (2027-2032) & (USD Million)

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Table 153. South America Infrared Thermal Detector Chip Sales Quantity by Type (2021-2026) & (Million Units)
Table 154. South America Infrared Thermal Detector Chip Sales Quantity by Type (2027-2032) & (Million Units)
Table 155. South America Infrared Thermal Detector Chip Sales Quantity by Application (2021-2026) & (Million Units)
Table 156. South America Infrared Thermal Detector Chip Sales Quantity by Application (2027-2032) & (Million Units)
Table 157. South America Infrared Thermal Detector Chip Sales Quantity by Country (2021-2026) & (Million Units)
Table 158. South America Infrared Thermal Detector Chip Sales Quantity by Country (2027-2032) & (Million Units)
Table 159. South America Infrared Thermal Detector Chip Consumption Value by Country (2021-2026) & (USD Million)
Table 160. South America Infrared Thermal Detector Chip Consumption Value by Country (2027-2032) & (USD Million)
Table 161. Middle East & Africa Infrared Thermal Detector Chip Sales Quantity by Type (2021-2026) & (Million Units)
Table 162. Middle East & Africa Infrared Thermal Detector Chip Sales Quantity by Type (2027-2032) & (Million Units)
Table 163. Middle East & Africa Infrared Thermal Detector Chip Sales Quantity by Application (2021-2026) & (Million Units)
Table 164. Middle East & Africa Infrared Thermal Detector Chip Sales Quantity by Application (2027-2032) & (Million Units)
Table 165. Middle East & Africa Infrared Thermal Detector Chip Sales Quantity by Country (2021-2026) & (Million Units)
Table 166. Middle East & Africa Infrared Thermal Detector Chip Sales Quantity by Country (2027-2032) & (Million Units)
Table 167. Middle East & Africa Infrared Thermal Detector Chip Consumption Value by Country (2021-2026) & (USD Million)
Table 168. Middle East & Africa Infrared Thermal Detector Chip Consumption Value by Country (2027-2032) & (USD Million)
Table 169. Infrared Thermal Detector Chip Raw Material
Table 170. Key Manufacturers of Infrared Thermal Detector Chip Raw Materials
Table 171. Infrared Thermal Detector Chip Typical Distributors
Table 172. Infrared Thermal Detector Chip Typical Customers

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List Of Figures

LIST OF FIGURES

Figure 1. Infrared Thermal Detector Chip Picture
Figure 2. Global Infrared Thermal Detector Chip Revenue by Type, (USD Million), 2021 & 2025 & 2032
Figure 3. Global Infrared Thermal Detector Chip Revenue Market Share by Type in 2025
Figure 4. Uncooled Thermal Imaging Detector Examples
Figure 5. Cooled Thermal Imaging Detector Examples
Figure 6. Other Examples
Figure 7. Global Infrared Thermal Detector Chip Revenue by Detection Principle, (USD Million), 2021 & 2025 & 2032
Figure 8. Global Infrared Thermal Detector Chip Revenue Market Share by Detection Principle in 2025
Figure 9. Thermal Detector Examples
Figure 10. Photon Detector Examples
Figure 11. Global Infrared Thermal Detector Chip Revenue by Detector Material, (USD Million), 2021 & 2025 & 2032
Figure 12. Global Infrared Thermal Detector Chip Revenue Market Share by Detector Material in 2025
Figure 13. Vanadium Oxide Examples
Figure 14. Mercury Cadmium Telluride Examples
Figure 15. Indium Antimonide Examples
Figure 16. Type-II Superlattice Examples
Figure 17. Other Detector Materials Examples
Figure 18. Global Infrared Thermal Detector Chip Revenue by Array Format, (USD Million), 2021 & 2025 & 2032
Figure 19. Global Infrared Thermal Detector Chip Revenue Market Share by Array Format in 2025
Figure 20. VGA-class Array Examples
Figure 21. HD-class Array Examples
Figure 22. Megapixel and Larger Array Examples
Figure 23. Other Examples
Figure 24. Global Infrared Thermal Detector Chip Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
Figure 25. Global Infrared Thermal Detector Chip Revenue Market Share by Application in 2025

+357 96 030922
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Figure 26. Thermal Measurement and Inspection Examples
Figure 27. Surveillance and Observation Examples
Figure 28. Targeting and Guidance Examples
Figure 29. Optical Gas Imaging Examples
Figure 30. Fire Detection and Rescue Examples
Figure 31. Scientific and Space Imaging Examples
Figure 32. Other Thermal Imaging Functions Examples
Figure 33. Global Infrared Thermal Detector Chip Consumption Value, (USD Million): 2021 & 2025 & 2032
Figure 34. Global Infrared Thermal Detector Chip Consumption Value and Forecast (2021-2032) & (USD Million)
Figure 35. Global Infrared Thermal Detector Chip Sales Quantity (2021-2032) & (Million Units)
Figure 36. Global Infrared Thermal Detector Chip Price (2021-2032) & (US$/Unit)
Figure 37. Global Infrared Thermal Detector Chip Sales Quantity Market Share by Manufacturer in 2025
Figure 38. Global Infrared Thermal Detector Chip Revenue Market Share by Manufacturer in 2025
Figure 39. Producer Shipments of Infrared Thermal Detector Chip by Manufacturer Sales ($MM) and Market Share (%): 2025
Figure 40. Top 3 Infrared Thermal Detector Chip Manufacturer (Revenue) Market Share in 2025
Figure 41. Top 6 Infrared Thermal Detector Chip Manufacturer (Revenue) Market Share in 2025
Figure 42. Global Infrared Thermal Detector Chip Sales Quantity Market Share by Region (2021-2032)
Figure 43. Global Infrared Thermal Detector Chip Consumption Value Market Share by Region (2021-2032)
Figure 44. North America Infrared Thermal Detector Chip Consumption Value (2021-2032) & (USD Million)
Figure 45. Europe Infrared Thermal Detector Chip Consumption Value (2021-2032) & (USD Million)
Figure 46. Asia-Pacific Infrared Thermal Detector Chip Consumption Value (2021-2032) & (USD Million)
Figure 47. South America Infrared Thermal Detector Chip Consumption Value (2021-2032) & (USD Million)
Figure 48. Middle East & Africa Infrared Thermal Detector Chip Consumption Value (2021-2032) & (USD Million)
Figure 49. Global Infrared Thermal Detector Chip Sales Quantity Market Share by Type

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(2021-2032)
Figure 50. Global Infrared Thermal Detector Chip Consumption Value Market Share by Type (2021-2032)
Figure 51. Global Infrared Thermal Detector Chip Average Price by Type (2021-2032) & (US$/Unit)
Figure 52. Global Infrared Thermal Detector Chip Sales Quantity Market Share by Application (2021-2032)
Figure 53. Global Infrared Thermal Detector Chip Revenue Market Share by Application (2021-2032)
Figure 54. Global Infrared Thermal Detector Chip Average Price by Application (2021-2032) & (US$/Unit)
Figure 55. North America Infrared Thermal Detector Chip Sales Quantity Market Share by Type (2021-2032)
Figure 56. North America Infrared Thermal Detector Chip Sales Quantity Market Share by Application (2021-2032)
Figure 57. North America Infrared Thermal Detector Chip Sales Quantity Market Share by Country (2021-2032)
Figure 58. North America Infrared Thermal Detector Chip Consumption Value Market Share by Country (2021-2032)
Figure 59. United States Infrared Thermal Detector Chip Consumption Value (2021-2032) & (USD Million)
Figure 60. Canada Infrared Thermal Detector Chip Consumption Value (2021-2032) & (USD Million)
Figure 61. Mexico Infrared Thermal Detector Chip Consumption Value (2021-2032) & (USD Million)
Figure 62. Europe Infrared Thermal Detector Chip Sales Quantity Market Share by Type (2021-2032)
Figure 63. Europe Infrared Thermal Detector Chip Sales Quantity Market Share by Application (2021-2032)
Figure 64. Europe Infrared Thermal Detector Chip Sales Quantity Market Share by Country (2021-2032)
Figure 65. Europe Infrared Thermal Detector Chip Consumption Value Market Share by Country (2021-2032)
Figure 66. Germany Infrared Thermal Detector Chip Consumption Value (2021-2032) & (USD Million)
Figure 67. France Infrared Thermal Detector Chip Consumption Value (2021-2032) & (USD Million)
Figure 68. United Kingdom Infrared Thermal Detector Chip Consumption Value (2021-2032) & (USD Million)

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Figure 69. Russia Infrared Thermal Detector Chip Consumption Value (2021-2032) & (USD Million)
Figure 70. Italy Infrared Thermal Detector Chip Consumption Value (2021-2032) & (USD Million)
Figure 71. Asia-Pacific Infrared Thermal Detector Chip Sales Quantity Market Share by Type (2021-2032)
Figure 72. Asia-Pacific Infrared Thermal Detector Chip Sales Quantity Market Share by Application (2021-2032)
Figure 73. Asia-Pacific Infrared Thermal Detector Chip Sales Quantity Market Share by Region (2021-2032)
Figure 74. Asia-Pacific Infrared Thermal Detector Chip Consumption Value Market Share by Region (2021-2032)
Figure 75. China Infrared Thermal Detector Chip Consumption Value (2021-2032) & (USD Million)
Figure 76. Japan Infrared Thermal Detector Chip Consumption Value (2021-2032) & (USD Million)
Figure 77. South Korea Infrared Thermal Detector Chip Consumption Value (2021-2032) & (USD Million)
Figure 78. India Infrared Thermal Detector Chip Consumption Value (2021-2032) & (USD Million)
Figure 79. Southeast Asia Infrared Thermal Detector Chip Consumption Value (2021-2032) & (USD Million)
Figure 80. Australia Infrared Thermal Detector Chip Consumption Value (2021-2032) & (USD Million)
Figure 81. South America Infrared Thermal Detector Chip Sales Quantity Market Share by Type (2021-2032)
Figure 82. South America Infrared Thermal Detector Chip Sales Quantity Market Share by Application (2021-2032)
Figure 83. South America Infrared Thermal Detector Chip Sales Quantity Market Share by Country (2021-2032)
Figure 84. South America Infrared Thermal Detector Chip Consumption Value Market Share by Country (2021-2032)
Figure 85. Brazil Infrared Thermal Detector Chip Consumption Value (2021-2032) & (USD Million)
Figure 86. Argentina Infrared Thermal Detector Chip Consumption Value (2021-2032) & (USD Million)
Figure 87. Middle East & Africa Infrared Thermal Detector Chip Sales Quantity Market Share by Type (2021-2032)
Figure 88. Middle East & Africa Infrared Thermal Detector Chip Sales Quantity Market

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Share by Application (2021-2032)
Figure 89. Middle East & Africa Infrared Thermal Detector Chip Sales Quantity Market Share by Country (2021-2032)
Figure 90. Middle East & Africa Infrared Thermal Detector Chip Consumption Value Market Share by Country (2021-2032)
Figure 91. Turkey Infrared Thermal Detector Chip Consumption Value (2021-2032) & (USD Million)
Figure 92. Egypt Infrared Thermal Detector Chip Consumption Value (2021-2032) & (USD Million)
Figure 93. Saudi Arabia Infrared Thermal Detector Chip Consumption Value (2021-2032) & (USD Million)
Figure 94. South Africa Infrared Thermal Detector Chip Consumption Value (2021-2032) & (USD Million)
Figure 95. Infrared Thermal Detector Chip Market Drivers
Figure 96. Infrared Thermal Detector Chip Market Restraints
Figure 97. Infrared Thermal Detector Chip Market Trends
Figure 98. Porters Five Forces Analysis
Figure 99. Manufacturing Cost Structure Analysis of Infrared Thermal Detector Chip in 2025
Figure 100. Manufacturing Process Analysis of Infrared Thermal Detector Chip
Figure 101. Infrared Thermal Detector Chip Industrial Chain
Figure 102. Sales Channel: Direct to End-User vs Distributors
Figure 103. Direct Channel Pros & Cons
Figure 104. Indirect Channel Pros & Cons
Figure 105. Methodology
Figure 106. Research Process and Data Source

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