

Global Li-ion Battery Fuel Gauge ICs Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Li-ion Battery Fuel Gauge ICs market size is expected to reach \$ 2641 million by 2032, rising at a market growth of 8.3% CAGR during the forecast period (2026-2032).

In 2025, global Li-ion Battery Fuel Gauge ICs sales volume reached approximately 3,282.46 Million Units, with a average price of 441 USD/K Units.

Li-ion Battery Fuel Gauge ICs are dedicated battery-management integrated circuits designed for lithium-ion and lithium-polymer battery systems. By monitoring battery voltage, current, temperature, charge/discharge capacity, impedance variation and battery model parameters, and by applying coulomb counting, open-circuit-voltage estimation, impedance tracking, temperature compensation and self-learning algorithms, these ICs estimate key battery indicators such as state of charge, state of health, remaining run time, full-charge capacity, aging status and low-battery alarms in real time. They can be implemented on the host side or the pack side and communicate with an MCU or application processor through interfaces such as I²C, SMBus, 1-Wire and HDQ. These chips are core analog/mixed-signal ICs for accurate runtime display, safety management, lifetime optimization and user-experience improvement in smartphones, notebooks, wearables, TWS earbuds, drones, power tools, portable medical devices, energy-storage packs and light electric mobility products.

Li-ion battery fuel gauge ICs sit at the intersection of power management ICs and analog/mixed-signal ICs. The production model is characterized by the coexistence of IDM manufacturers with proprietary process platforms and fabless design companies outsourcing wafer fabrication. Leading IDMs typically own capabilities in analog front ends, ADCs, ultra-low-power design, embedded NVM, packaging, testing and long-term

supply assurance, while fabless suppliers compete through battery-model algorithms, application engineering, reference designs, system-level tuning and fast customer design-in. Manufacturing generally uses mature CMOS, BCD or high-voltage analog processes, with WLCSP, CSP, DFN and QFN packages widely adopted for compact end devices. Back-end testing focuses on low power consumption, ADC accuracy, current-sense precision, temperature drift, ESD robustness, aging calibration and compatibility with different battery chemistries.

In terms of profitability, low-end voltage-based or simplified coulomb-counting gauges face stronger price competition, with gross margins typically around 30%-45%. Mainstream single-cell and multi-cell smart fuel gauge ICs with algorithms, NVM, protection linkage and communication interfaces usually achieve gross margins of around 45%-60%. High-end products featuring impedance tracking, dynamic learning, authentication, automotive/industrial-grade reliability, multi-cell support or deep customization with battery-pack platforms can reach 60%-70% or higher. The upstream value chain includes EDA/IP, wafer foundries, analog process platforms, assembly and testing, precision resistors, NTCs, current-sense components and battery characterization databases. The midstream consists of fuel gauge IC design, algorithm development, packaging, testing and application solutions. Downstream markets include consumer electronics, power tools, medical electronics, smart homes, drones, energy storage, light electric mobility and battery systems related to new energy vehicles. The industry's value is increasingly built not only on silicon hardware, but also on the compound barriers of algorithms, battery models, customer validation data and long-term supply capability.

The core opportunity for Li-ion battery fuel gauge ICs comes from the fact that every mobile, wireless and intelligent device requires more trustworthy runtime management. Smartphones, AI PCs, wearables, TWS earbuds, drones and portable medical devices are demanding thinner designs, fast charging, higher-capacity batteries and all-day battery life, making simple voltage-based estimation insufficient for accurate remaining-capacity display, low-temperature discharge prediction and aging compensation. At the same time, power tools, robots, energy storage, light electric vehicles and battery systems related to new energy vehicles are transforming battery-state data from a display function into a foundation for safety, warranty, asset valuation and second-life use. For chip suppliers, fuel gauge ICs are evolving from low-value monitoring components into higher-value products built on algorithms, data feedback loops and customer platform lock-in.

The key challenge in this market is the long validation cycle and the difficulty of

replacing incumbent suppliers once a platform is designed in. Fuel gauge accuracy depends heavily on battery chemistry, discharge rate, temperature, aging path and system load profile; therefore, hardware specifications alone do not determine the final user experience. Suppliers need accumulated battery-model databases, algorithm-tuning expertise and validated customer references. In low-end consumer electronics, price sensitivity, domestic substitution and generic device competition can compress margins. In high-end markets, suppliers must meet requirements for low power consumption, high accuracy, secure authentication, functional safety, automotive-grade reliability and long-term supply. If a product cannot adapt to new battery chemistries, fast-charging strategies, swappable battery packs or emerging regulatory requirements, its customer design-in window may narrow quickly. Downstream demand is shifting from simple remaining-capacity display toward full-lifecycle battery data management. Consumer electronics customers prioritize compact packaging, ultra-low quiescent current, first-cycle accuracy, fast-charge calibration and improved user experience. Industrial and medical customers place greater emphasis on reliability, low-temperature performance, long-term drift and safety alarms. Energy storage, light electric mobility and new-energy-vehicle-related customers increasingly value SOC/SOH consistency, data traceability, warranty management and second-life battery valuation. In the future, high-end fuel gauge ICs will integrate more protection, authentication, NVM, temperature monitoring, edge algorithms and multi-cell management features. Industry competition will move beyond unit chip price toward system-level solution capability combining chips, algorithms, reference designs and customer battery data.

This report studies the global Li-ion Battery Fuel Gauge ICs production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Li-ion Battery Fuel Gauge ICs 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 Li-ion Battery Fuel Gauge ICs that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Li-ion Battery Fuel Gauge ICs total production and demand, 2021-2032, (Million Units)

Global Li-ion Battery Fuel Gauge ICs total production value, 2021-2032, (USD Million)

Global Li-ion Battery Fuel Gauge ICs production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Units), (based on production site)

Global Li-ion Battery Fuel Gauge ICs consumption by region & country, CAGR,

2021-2032 & (Million Units)

U.S. VS China: Li-ion Battery Fuel Gauge ICs domestic production, consumption, key domestic manufacturers and share

Global Li-ion Battery Fuel Gauge ICs production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Units)

Global Li-ion Battery Fuel Gauge ICs production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global Li-ion Battery Fuel Gauge ICs production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global Li-ion Battery Fuel Gauge ICs market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Texas Instruments, Analog Devices, Renesas Electronics, STMicroelectronics, Guangdong MicroPowerChip, onsemi, CellWise Microelectronics, Chipsea Technologies, Chipown Microelectronics, Minebea Semiconductor, 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 Li-ion Battery Fuel Gauge ICs market

Detailed Segmentation:

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

Global Li-ion Battery Fuel Gauge ICs Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Li-ion Battery Fuel Gauge ICs Market, Segmentation by Type:

Single Battery Fuel ICs

Multiple Battery Fuel ICs

Global Li-ion Battery Fuel Gauge ICs Market, Segmentation by Integration Level:

Standalone Battery Fuel ICs

Integrated Battery Fuel ICs

Global Li-ion Battery Fuel Gauge ICs Market, Segmentation by Measurement Principle:

OCV-based Gauge

Coulomb Counter

Others

Global Li-ion Battery Fuel Gauge ICs Market, Segmentation by Application:

Smartphones

Laptops and Tablets

Wearable Devices

Industrial Equipment

Medical Devices

Electric Vehicles

Others

Companies Profiled:

Texas Instruments

Analog Devices

Renesas Electronics

STMicroelectronics

Guangdong MicroPowerChip

onsemi

CellWise Microelectronics

Chipsea Technologies

Chipown Microelectronics

Minebea Semiconductor

Microchip Technology

Richtek Technology

O2Micro

Hycon Technology

AmagicTech

Tinychip Micro

OnMicro

National Technology

Key Questions Answered:

1. How big is the global Li-ion Battery Fuel Gauge ICs market?
2. What is the demand of the global Li-ion Battery Fuel Gauge ICs market?
3. What is the year over year growth of the global Li-ion Battery Fuel Gauge ICs market?
4. What is the production and production value of the global Li-ion Battery Fuel Gauge ICs market?
5. Who are the key producers in the global Li-ion Battery Fuel Gauge ICs market?
6. What are the growth factors driving the market demand?

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