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Global LiDAR Receiver ASIC Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global LiDAR Receiver ASIC market size is expected to reach $ 1628 million by 2032, rising at a market growth of 16.9% CAGR during the forecast period (2026-2032).

The LiDAR Receiver ASIC market covers application-specific integrated circuits designed to detect, condition, acquire, time, digitize, and process optical return signals within LiDAR receive chains. The research scope focuses on dedicated analog front-end ASICs, transimpedance amplifiers, multi-channel data-acquisition ICs, SPAD- and SiPM-based receiver chips, integrated dToF receiver SoCs, ToF image sensors used in LiDAR architectures, and coherent receiver ASICs for FMCW systems. Depending on the product architecture, these devices may integrate photodetector interfaces, gain control, ambient-light cancellation, overload recovery, analog-to-digital conversion, time-to-digital conversion, photon-event counting, histogram processing, distance calculation, Doppler processing, and preliminary point-level processing. Key performance indicators include input-referred noise, bandwidth, dynamic range, timing resolution, photon-detection efficiency, channel density, crosstalk, ambient-light tolerance, power consumption, operating temperature, and functional-safety capability. LiDAR Receiver ASIC products are primarily used in automotive perception, mobile robotics, industrial automation, precision ranging, spatial mapping, intelligent infrastructure, security monitoring, and specialized sensing systems.

Key Findings

The validated Core Formal List comprises 22 LiDAR Receiver ASIC producers

Integrated dToF receiver SoCs and ToF imagers represent approximately half of

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modeled product value

Two leading China-based suppliers shipped more than 2.53 million LiDAR units in 2025

Asia accounted for 74% of new industrial robot installations in 2024

Technology development centers on stacked SPAD, multi-channel acquisition, and coherent FMCW integration

Market Trends

The LiDAR Receiver ASIC industry is moving from discrete receive chains toward more highly integrated and digitally controlled architectures. Conventional photodiode or APD receivers continue to use dedicated transimpedance amplifiers where high bandwidth, wide dynamic range, and rapid overload recovery are required, while multi-channel acquisition ICs increasingly combine analog conditioning, conversion, timing, and preliminary echo processing. In parallel, stacked SPAD architectures are separating the photon-detection layer from advanced logic, allowing manufacturers to increase pixel density, timing capability, and on-chip processing without relying on a single process node for every function. Receiver SoCs are also moving closer to direct distance, intensity, or velocity output, reducing external FPGA requirements and simplifying system calibration. FMCW products remain a smaller technology segment but are advancing through coherent detection ASICs and photonic-electronic integration that support simultaneous distance and radial-velocity measurement. These changes are shifting product differentiation toward system-level power efficiency, interference resistance, functional safety, manufacturability, and the quality of detector–ASIC–algorithm co-optimization rather than individual component specifications alone.

Market Dynamics

Drivers

Demand is being supported by the expansion of automotive perception, mobile robotics, automated material handling, industrial inspection, and intelligent infrastructure. Higher LiDAR shipment volumes increase demand for lower-power, higher-channel-count

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receiver ASICs capable of operating under strong ambient light and wide temperature ranges. Robotics is becoming particularly important because navigation and obstacle-avoidance systems require compact sensors with continuous spatial awareness, while cost-sensitive autonomous platforms favor integrated receiver SoCs that reduce external components. The International Federation of Robotics reported 542,000 industrial robot installations in 2024, with annual installations remaining above 500,000 for four consecutive years. Company disclosures also indicate rapid LiDAR shipment growth in robotics and automotive applications, strengthening the commercial case for dedicated receiver silicon and captive ASIC development.

Restraints

The market remains constrained by demanding performance requirements, long automotive qualification cycles, and significant design and manufacturing complexity. Receiver circuits must detect weak optical returns while recovering quickly from high-intensity reflections, direct sunlight, crosstalk, and electrical interference. Integrated SPAD products require control of dark-count rate, photon-detection efficiency, dead time, pixel uniformity, and optical or electrical crosstalk, while 3D-stacked products add bonding, thermal, test, and yield-management requirements. In long-range and coherent architectures, detector cost, high-speed conversion, precision timing, packaging, and signal-processing workloads can materially increase system cost. Price pressure from LiDAR system manufacturers also limits the ability of ASIC suppliers to pass through development expenses, particularly where annual volumes remain uncertain.

Opportunities

The most attractive opportunities are associated with higher integration, larger receiver arrays, application-specific digital processing, and the transition from evaluation projects to repeatable platform deployments. Stacked SPAD receiver SoCs can address near-field automotive sensing, compact solid-state LiDAR, robotics, and high-resolution depth imaging, while programmable multi-channel acquisition ASICs allow manufacturers to serve several detector configurations through a common platform. Coherent FMCW receiver ASICs offer an additional opportunity where direct velocity measurement, interference resistance, and longer-range performance justify greater optical and processing complexity. There is also room for regional suppliers to replace imported analog front ends and receiver SoCs through lower-cost designs, local technical support, and closer cooperation with LiDAR system manufacturers. New opportunities

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will increasingly depend on qualified reference designs and scalable manufacturing rather than the availability of standalone prototype chips.

Challenges

Long-term challenges include fragmented technical architectures, limited standardization, rapid product-generation changes, and the difficulty of translating design wins into stable high-volume revenue. APD, SiPM, monolithic SPAD, stacked SPAD, hybrid photonic-electronic, and FMCW receivers require different processes and supply chains, reducing the transferability of investments across product families. Captive ASIC development by major LiDAR system manufacturers may narrow the addressable market for merchant suppliers, while simultaneously raising the performance benchmark for independent chip companies. Qualification failures, wafer-yield volatility, packaging limitations, customer concentration, and delayed vehicle programs can materially affect revenue visibility. The industry must also manage substitution risks from improved imaging radar, cameras, and sensor-fusion architectures, particularly in applications where LiDAR performance does not justify its incremental system cost.

Industry Chain Analysis

The upstream LiDAR Receiver ASIC supply chain comprises semiconductor process technologies, detector materials, silicon and compound-semiconductor wafers, SPAD and CMOS image-sensor processes, analog and mixed-signal intellectual property, high-speed data converters, silicon photonics, advanced packaging materials, and electronic-design automation. Product architecture determines the upstream dependency: external-detector analog front ends rely heavily on low-noise mixed-signal processes, integrated dToF chips require optimized SPAD and timing technologies, and FMCW receivers depend more strongly on high-speed conversion, coherent photonics, and precision packaging. Foundry availability, process maturity, photodetector performance, mask and engineering costs, and packaging yield collectively influence unit economics.

The midstream includes integrated device manufacturers, fabless receiver-chip designers, custom-ASIC providers, and LiDAR system manufacturers developing captive silicon. Value is created through detector-interface design, noise and dynamic-range optimization, time measurement, photon-event processing, calibration, safety mechanisms, and the conversion of raw return signals into usable distance or velocity

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data. Downstream value is realized through integration into optical engines, LiDAR modules, perception systems, robots, vehicles, industrial equipment, and mapping platforms. Gross-margin potential is generally higher for differentiated high-performance ASICs and qualified automotive products, but substantial research, mask, packaging, validation, and customer-support costs mean profitability depends strongly on reusable platforms and sustained production volumes.

Segment Insights

By product type, integrated dToF receiver SoCs and ToF imagers form the largest modeled value segment, representing approximately half of the current product value pool. Their position reflects the ability to combine photon detection, timing, histogram processing, ambient-light suppression, and ranging functions in a compact semiconductor platform. Analog front-end and data-acquisition ASICs remain a substantial segment, particularly in long-range pulsed systems where customers require flexibility in detector selection and receiver-channel design. Captive ASICs used by LiDAR system manufacturers also account for a meaningful share of industry value, although these devices are generally not sold as independent merchant products.

By receiver principle, direct time-of-flight remains the commercially dominant architecture, covering both linear-mode APD receivers and digital SPAD-based solutions. Stacked SPAD and area-array receivers are among the fastest-developing product directions because they support higher channel density and deeper on-chip processing. Coherent FMCW receivers currently represent a smaller share but provide differentiated opportunities in direct velocity measurement and interference-resistant sensing. By integration structure, the market is progressing from external-detector interfaces toward monolithic, 3D-stacked, hybrid-packaged, and photonic-electronic solutions, with each approach balancing sensitivity, cost, yield, flexibility, and processing capability.

Downstream Market Opportunities

Automotive perception remains an important opportunity because higher levels of driving assistance require reliable long-range detection, near-field blind-zone coverage, and improved operation under complex lighting conditions. Robotics is developing into a broader volume market as autonomous mobile robots, delivery platforms, robotic lawn mowers, humanoid systems, and industrial vehicles require compact and cost-efficient spatial sensing. Industrial measurement, warehouse automation, infrastructure

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monitoring, security, and three-dimensional mapping provide additional demand with different performance and qualification requirements. The strongest commercial opportunities are expected where receiver ASIC integration reduces optical alignment, external processing, power consumption, calibration complexity, or overall sensor cost rather than merely improving a single chip specification.

Regional Insights

Asia-Pacific represents the leading regional center for LiDAR Receiver ASIC manufacturing activity, system production, and emerging volume applications. Japan maintains strengths in stacked SPAD sensors, automotive semiconductor quality systems, and multi-channel acquisition technology, while China has developed a broad group of SPAD receiver-chip companies and LiDAR manufacturers using proprietary ASICs. China-based suppliers reported more than 2.53 million combined LiDAR shipments in 2025 across two leading companies, demonstrating the scale at which captive and locally sourced receiver silicon can be absorbed. The region also benefits from a large electronics manufacturing base and its dominant share of global industrial robot deployment.

North America has a comparatively strong position in high-performance analog front ends, custom ASIC design, digital LiDAR SoCs, silicon photonics, and coherent FMCW receivers. Europe is differentiated by automotive-grade analog and mixed-signal capabilities, functional-safety expertise, and integrated ToF sensing. Israel and South Korea have smaller supplier pools but maintain specialized positions in CMOS eTOF and SPAD receiver SoCs. Regional competition is increasingly influenced by local supply-chain security, access to qualified foundries and advanced packaging, customer engineering support, and the ability to complete automotive or industrial qualification close to end users.

Competitive Landscape Analysis

The LiDAR Receiver ASIC competitive landscape is fragmented by product architecture and commercial model rather than controlled by a single class of supplier. The confirmed Core Formal List contains 22 producers, including large diversified semiconductor companies, specialized fabless receiver-chip vendors, custom-ASIC providers, and LiDAR system manufacturers with captive silicon. Large semiconductor companies compete through process maturity, automotive qualification, broad analog

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portfolios, long-term supply capability, and established sales channels. Specialist companies differentiate through SPAD arrays, 3D stacking, high-channel-count timing circuits, SiPM readout, coherent detection, or photonic-electronic integration. Captive ASIC developers use vertical integration to optimize detector selection, signal processing, power, optical architecture, and system cost, but their chips are generally unavailable to external customers. Competitive advantage is therefore determined by verified product performance, manufacturing yield, qualification status, customer design wins, reusable architectures, and the ability to support sustained production rather than company size alone. Future consolidation may occur through technology acquisitions, licensing, and closer cooperation between detector, ASIC, photonics, and LiDAR system companies, while low-confidence prototype and IP-only providers remain outside the core commercial supplier group.

Report Scope

This report studies the global LiDAR Receiver ASIC production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for LiDAR Receiver ASIC 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 LiDAR Receiver ASIC that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global LiDAR Receiver ASIC total production and demand, 2021-2032, (Million Units)

Global LiDAR Receiver ASIC total production value, 2021-2032, (USD Million)

Global LiDAR Receiver ASIC production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Units), (based on production site)

Global LiDAR Receiver ASIC consumption by region & country, CAGR, 2021-2032 & (Million Units)

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U.S. VS China: LiDAR Receiver ASIC domestic production, consumption, key domestic manufacturers and share

Global LiDAR Receiver ASIC production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Units)

Global LiDAR Receiver ASIC production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global LiDAR Receiver ASIC production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global LiDAR Receiver ASIC 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 Sony Group Corporation, Texas Instruments Incorporated, Infineon Technologies AG, Analog Devices, Inc., Renesas Electronics Corporation, MACOM Technology Solutions Holdings, Inc., Melexis N.V., Elmos Semiconductor SE, Hesai Group, RoboSense Technology Co., Ltd, 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 LiDAR Receiver ASIC market

Detailed Segmentation:

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

Global LiDAR Receiver ASIC Market, By Region:

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United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global LiDAR Receiver ASIC Market, Segmentation by Type:

Analog Front-End ASIC

Data Acquisition ASIC

Other

Global LiDAR Receiver ASIC Market, Segmentation by Receiver Principle:

Linear-Mode Receiver

Photon-Counting Receiver

Coherent Receiver

Other Receiver Principle

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Global LiDAR Receiver ASIC Market, Segmentation by Detector Integration:

External Detector Interface

Monolithic Integration

3D-Stacked Integration

Photonic-Electronic Integration

Other

Global LiDAR Receiver ASIC Market, Segmentation by Channel Configuration:

Single-Channel Receiver

Multi-Channel Receiver

Other Channel Configuration

Global LiDAR Receiver ASIC Market, Segmentation by Application:

Navigation and Obstacle Avoidance

Precision Ranging and Metrology

Mapping and Spatial Reconstruction

Motion and Velocity Measurement

Monitoring and Intrusion Detection

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Other

Companies Profiled:

Sony Group Corporation

Texas Instruments Incorporated

Infineon Technologies AG

Analog Devices, Inc.

Renesas Electronics Corporation

MACOM Technology Solutions Holdings, Inc.

Melexis N.V.

Elmos Semiconductor SE

Hesai Group

RoboSense Technology Co., Ltd

indie Semiconductor, Inc.

Ouster, Inc.

Maxic Technology, Inc.

Innoviz Technologies Ltd.

Aeva Technologies, Inc.

SiLC Technologies, Inc.

FortSense

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Adaps Photonics

Siliconroad Semiconductor Co., Ltd.

Newsight Imaging Ltd.

SOLiDVUE, Inc.

Weeroc

Key Questions Answered

1. How big is the global LiDAR Receiver ASIC market?
2. What is the demand of the global LiDAR Receiver ASIC market?
3. What is the year over year growth of the global LiDAR Receiver ASIC market?
4. What is the total value of the global LiDAR Receiver ASIC market?
5. Who are the Major Players in the global LiDAR Receiver ASIC market?
6. What are the growth factors driving the market demand?

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