

Global Power IC for Energy Harvesting 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 Power IC for Energy Harvesting market size was valued at US\$ 255 million in 2025 and is forecast to a readjusted size of US\$ 639 million by 2032 with a CAGR of 14.0% during review period.

Power ICs for energy harvesting are ultra low power power management devices designed for ambient micro energy supply scenarios. Their core task is to complete cold start, maximum power point tracking, boost or buck conversion, energy storage charging, power path switching, voltage protection, and regulated output under conditions where input power from photovoltaic, thermoelectric, radio frequency, and other sources is highly unstable and extremely limited. This allows low power endpoints such as sensor nodes, electronic shelf labels, building automation terminals, industrial monitoring devices, wearables, and asset trackers to reduce dependence on frequent primary battery replacement or wired power. The mainstream technology paradigm has evolved from single solar chargers to architectures that manage multiple energy sources or multiple storage objects. These ICs support not only photovoltaic and thermoelectric inputs, but also RF harvesting and a wide range of storage elements including batteries, supercapacitors, thin film batteries, and conventional capacitors. Some devices further integrate multiple outputs, power gating, LDOs, programmable MPPT, and battery protection functions, enabling relatively high conversion efficiency from microwatt to milliwatt input levels while adapting to rapidly changing light, temperature gradient, and RF conditions through different MPPT methods. Typical customers include wireless sensor manufacturers, industrial IoT device suppliers, smart building solution providers, wearable and medical terminal developers, and system integrators seeking to reduce maintenance and cabling costs. Standard PMIC chips remain the dominant delivery form, usually accompanied by evaluation boards,

reference designs, and application support. The business model is centered on standard device sales and is extending toward Ambient IoT, maintenance free wireless sensing, and green electronic systems. The core value of this product category lies in converting previously scattered and non continuously usable ambient energy into commercially usable power capability.

From a product evolution perspective, power ICs for energy harvesting are no longer merely miniature solar chargers in the traditional sense. They are becoming system level foundational platforms that integrate harvesting, storage, power delivery, and protection within a single ultra low power power management architecture. The core points of competition have shifted from simply achieving boost conversion or charging to delivering a balanced combination of extremely low cold start thresholds, nanoamp class quiescent current, maximum power point tracking algorithms, storage compatibility, and multi output power management. Vendors such as e-peas, Nexperia, ADI, TI, and ST are using approaches including configurable MPPT, embedded hill climbing algorithms, fractional open circuit voltage methods, hybrid storage, and power path management. The common goal is to extract as much usable energy as possible in real environments where light variation, temperature differences, and pulsed loads coexist, while preventing the source from collapsing. This means the barrier to entry is not limited to analog power design itself, but extends to system level understanding of source behavior, storage characteristics, and end load profiles. As a result, future high value products are likely to remain concentrated among companies that combine high integration, strong control algorithms, and scenario specific optimization capabilities. Competition therefore is unlikely to become a simple price war. Instead, it will center on who can deliver stable and repeatable solutions under lower illumination, smaller harvesters, more complex storage configurations, and longer maintenance free operating cycles. For end customers, the real appeal is not a single standout specification, but whether the IC can continuously provide usable power in a real deployed system while reducing peripheral component count, debugging difficulty, and field maintenance frequency.

From a commercialization perspective, the clearest demand center for this product category is not the traditional high power supply market, but the edge node market where unit power consumption is extremely low but deployment volume is massive. Official pages from ST, TI, ADI, Nisshinbo, and Infineon consistently position wireless sensors, building automation, remote monitoring, smart lighting, industrial control, wearables, and asset tracking as major use cases. This shows that the industry growth logic does not rely on a high price per chip, but on a growing number of end applications willing to replace primary batteries or part of their cabling cost with ambient energy. As

electronic shelf labels, industrial condition monitoring, smart building sensing networks, and medical and health monitoring devices continue to expand, end customers will place greater emphasis on low maintenance, long lifetime, compact size, and green power delivery. In many retrofit building and distributed industrial scenarios, the total cost of ownership for wiring and battery replacement is far higher than the chip itself. Therefore, as long as an energy harvesting solution can significantly extend maintenance intervals, the value of the IC is magnified by system level savings. What will truly drive volume growth is not only further improvement in chip level parameters, but also the maturity of evaluation boards, reference designs, modular solutions, and wireless platform integration that lowers the barrier from validation to mass production. This is also why companies such as Powercast in RF harvesting and e-peas in Ambient IoT place solution completeness and scenario fit at the center of their product narrative. The market is gradually moving from selling a chip to selling a reusable low power self powered platform for integrators.

From the perspective of regional structure and policy environment, the currently verifiable vendors are mainly distributed across Europe, the United States, Japan, and China. This indicates that the sector is still led by regions with strong industrial systems and advanced analog design capabilities, while opportunities for localization and regional supply chain reinforcement are beginning to emerge. European vendors emphasize reducing battery replacement and lowering carbon footprint. U.S. vendors are strong in ultra low power and multi scenario platformization. Japanese vendors are more specialized in indoor light and compact wireless nodes. Chinese vendors are beginning to commercialize products around micro light charging and local IoT applications. More importantly, the external policy environment is strengthening the long term attractiveness of these solutions. The EU Battery Regulation is embedding low carbon footprint, reduced raw material use, and higher recycling efficiency into the regulatory framework. The United States is also moving forward on battery recycling and producer responsibility systems, while China continues to reinforce decarbonization and green manufacturing. In this context, any power solution that can reduce primary battery consumption, extend maintenance free operating periods, and cut wiring and replacement costs is more likely to receive customer budgets and project approval. Looking ahead, as Ambient IoT, green buildings, industrial digitalization, and sustainable electronic systems continue to advance, power ICs for energy harvesting may remain smaller in absolute market size than general purpose PMICs, but their growth potential, value added, and barriers to entry are likely to be clearly higher than many traditional long tail power categories. As regulation and ESG targets increasingly demand longer device life, fewer battery changes, and easier recycling, these ICs are evolving from optional energy saving parts into key foundational devices in low power

endpoint systems. Future leadership will depend more on whether vendors can translate policy direction, system cost, and device performance into scalable product architectures.

This report is a detailed and comprehensive analysis for global Power IC for Energy Harvesting 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 Power IC for Energy Harvesting market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Power IC for Energy Harvesting market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Power IC for Energy Harvesting market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Power IC for Energy Harvesting market shares of main players, shipments in revenue (\$ Million), sales quantity (K 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 Power IC for Energy Harvesting

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 Power IC for Energy Harvesting 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 Asahi Kasei Microdevices Corporation, Analog Devices, Inc., e-peas SA, STMicroelectronics N.V., Texas Instruments Incorporated, Nexperia B.V., EM Microelectronic-Marin SA, Powercast Corporation, Nisshinbo Micro Devices Inc., ROHM Co., Ltd., etc.

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

Market Segmentation

Power IC for Energy Harvesting 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 segment by Type

868MHz

915Mhz

2.45GHz

Others

Market segment by Energy Source Type

Photovoltaic Harvesting

Thermoelectric Harvesting

RF Harvesting

Other

Market segment by Storage Object Type

Supercapacitor Type

Rechargeable Battery Type

Other

Market segment by Application

Piezo Harvesting

Home Automation

Smart Agriculture

Industrial Monitoring

Others

Major players covered

Asahi Kasei Microdevices Corporation

Analog Devices, Inc.

e-peas SA

STMicroelectronics N.V.

Texas Instruments Incorporated

Nexperia B.V.

EM Microelectronic-Marin SA

Powercast Corporation

Nisshinbo Micro Devices Inc.

ROHM Co., Ltd.

Infineon Technologies AG

Ningbo Madeit Semiconductor 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)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Power IC for Energy Harvesting product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Power IC for Energy Harvesting, with price, sales quantity, revenue, and global market share of Power IC for Energy Harvesting from 2021 to 2026.

Chapter 3, the Power IC for Energy Harvesting competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Power IC for Energy Harvesting 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 Power IC for Energy Harvesting 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 Power IC for Energy Harvesting.

Chapter 14 and 15, to describe Power IC for Energy Harvesting sales channel, distributors, customers, research findings and conclusion.

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