

Global ToF Driver IC Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global ToF Driver IC market size is expected to reach \$ 2691 million by 2032, rising at a market growth of 19.2% CAGR during the forecast period (2026-2032).

A ToF Driver IC is a critical analog and mixed-signal chip used in time-of-flight ranging and depth-sensing systems. Its core role is to provide high-speed switching, high-current pulsing, stable modulation, and power control for emitters such as VCSELs, laser diodes, or LEDs under tight constraints on power consumption, thermal design, size, and safety, thereby converting electrical signals into optical signals suitable for distance measurement and 3D sensing. These products are typically designed around indirect ToF, enhanced ToF, or broader ToF ranging chains, and commonly integrate capabilities such as LVDS or SPI control interfaces, APC, temperature monitoring, fail-safe protection, ambient light rejection, and system-level optimization with external emitters, detectors, and host controllers. Typical customers include smartphone and consumer-electronics module makers, automotive in-cabin sensing and driver-monitoring solution providers, and industrial automation and robotics equipment vendors, with further extensions into short-range LiDAR, access control, parking, smart spaces, and human presence detection. In terms of delivery form, the market includes both pure VCSEL laser driver ICs and ToF processing chips that integrate part of the signal-processing and emitter-driving functions. Commercially, the dominant model is standard chip sales, supplemented by evaluation boards, driver software, reference designs, and system support to accelerate design-in.

The value of the ToF Driver IC industry is evolving from that of a conventional emitter-side companion component into a core analog and mixed-signal node that determines ranging accuracy, power behavior, thermal stability, and system manufacturability. Official product pages show that leading vendors no longer emphasize only drive

current. Instead, they are expanding product capability boundaries to include LVDS reception, SPI configuration, APC, temperature monitoring, fail-safe protection, environmental robustness, and evaluation-board support, indicating that competition is shifting from isolated performance metrics to system-level capability. For module makers and end-device brands, what truly matters is not simply turning on a VCSEL, but maintaining stable and repeatable optical output and ranging results across different emitters, temperatures, target distances, and system power budgets. As a result, the future pricing power of ToF Driver IC vendors will increasingly come from calibratability, protection capability, certifiability, and the ability to shorten design-in cycles, rather than from a single leading parameter alone.

On the demand side, consumer electronics remains the clearest mass-production base today, but automotive and industrial applications are pulling the industry toward higher specifications and a longer growth runway. ETEK and Awinic product descriptions indicate that smartphone cameras, AR/VR depth sensing, proximity detection, and 3D imaging remain mainstream deployment scenarios, meaning the sector should continue to benefit in the near term from mobile-device and lightweight spatial-sensing demand. At the same time, Infineon directly targets in-cabin sensing, driver monitoring, occupant classification, parking assistance, and other LiDAR applications, while backing the product with AEC-Q100 Grade 2 qualification, showing that the automotive market is pushing ToF Driver ICs from consumer-grade components toward platformized, automotive-qualified, long-lifecycle supply systems. Renesas also covers industrial automation, access control, level monitoring, and human presence detection, indicating that industrial and smart-space applications are adding a second demand curve and giving the industry the potential to move from a single consumer cycle to multi-industry resonance.

From a competitive and regional perspective, this remains a typical high-barrier, niche semiconductor market with a limited number of core players but clear technical differentiation. Verified companies span Germany, the United States, Japan, South Korea, and China. Some vendors follow a highly integrated, small-package route for smartphones and general 3D sensing, while others focus on high peak current, high-speed modulation, and automotive-grade reliability for automotive and high-performance eToF use cases, and still others combine signal processing with emitter driving to capture system-cost and integration advantages. EPC, with 15A peak current and nanosecond-class pulse capability, Infineon, with 10A, 130MHz, and automotive qualification, and Awinic and ETEK, with WLCSP miniaturization and APC-related capabilities, each represent distinct competitive directions. As 3D sensing continues to penetrate cockpits, robots, smart spaces, and short-range LiDAR, the industry is

unlikely to become fully commoditized quickly. Instead, it is more likely to develop into a structurally growing market segmented by application scenario, current class, reliability grade, and level of integration.

This report studies the global ToF Driver IC production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for ToF Driver IC 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 ToF Driver IC that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global ToF Driver IC total production and demand, 2021-2032, (Million Units)

Global ToF Driver IC total production value, 2021-2032, (USD Million)

Global ToF Driver IC production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Units), (based on production site)

Global ToF Driver IC consumption by region & country, CAGR, 2021-2032 & (Million Units)

U.S. VS China: ToF Driver IC domestic production, consumption, key domestic manufacturers and share

Global ToF Driver IC production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Units)

Global ToF Driver IC production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global ToF Driver IC production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global ToF Driver IC 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 Infineon Technologies AG, Efficient Power Conversion Corporation, Wuxi ETEK Micro-Electronics Co., Ltd., Shanghai Awinic Technology Co., Ltd., Dongwoon Anatech Co., Ltd., Renesas Electronics Corporation, etc.

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

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World ToF Driver IC 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 ToF Driver IC Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global ToF Driver IC Market, Segmentation by Type:

dToF Driver IC

iToF Driver IC

Global ToF Driver IC Market, Segmentation by Technology Route:

IToF Driver

EToF / Pulsed Laser Driver

ToF Signal Processing IC With Emitter Driver

Global ToF Driver IC Market, Segmentation by Output Current Class:

Up To 255 MA

Above 255 MA To 4 A

Above 4 A To 10 A

Above 10 A

Global ToF Driver IC Market, Segmentation by Application:

Smartphone

Automotive

Robotics

Digital Signage

Smart Home

Sport and Games

Medical and Military

Companies Profiled:

Infineon Technologies AG

Efficient Power Conversion Corporation

Wuxi ETEK Micro-Electronics Co., Ltd.

Shanghai Awinic Technology Co., Ltd.

Dongwoon Anatech Co., Ltd.

Renesas Electronics Corporation

Key Questions Answered:

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

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