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Global Ultrasonic Sensor IC Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Ultrasonic Sensor IC market size is expected to reach $ 1763 million by 2032, rising at a market growth of 8.6% CAGR during the forecast period (2026-2032).

Ultrasonic Sensor Chips are semiconductor ICs or MEMS-based sensor chips used to generate, drive, receive, condition, time, or directly transduce ultrasonic signals in distance sensing, proximity detection, automotive parking, low-speed ADAS, smart metering, industrial level sensing, robotics, drones, and HMI touch applications. The market includes ultrasonic transducer driver ICs, ultrasonic AFE and receiver ICs, ToF signal-processing SoCs, TDC metering chips, PMUT/CMUT ultrasonic sensor chips, automotive ultrasonic radar interface ICs, and ultrasonic HMI sensor SoCs. The scope excludes passive ultrasonic transducers, complete sensor modules, parking sensor assemblies, medical ultrasound imaging systems, and distributors.

Key Findings Automotive parking remains the anchor market Flow-metering chips provide stable demand PMUT ToF sensors create miniaturized applications Ultrasonic HMI is an emerging use case Europe leads automotive ultrasonic ICs China accelerates local chip replacement

Market Trends The market is evolving from traditional piezo transducer driver ICs toward more integrated ultrasonic sensing solutions. Automotive ultrasonic ICs are adding diagnostics, functional safety, multi-interface support, and richer echo processing. Metering chips are integrating AFE, TDC and computation to support low-power smart water and heat meters. MEMS ultrasonic sensors are moving toward PMUT/CMUT integration with ASICs and on-chip algorithms, enabling smaller and lower-power ToF, presence detection, and HMI applications.

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Market Dynamics Drivers include intelligent parking, low-speed ADAS, smart water and heat metering, industrial liquid and distance sensing, robotics, smart surfaces, and demand for low-power short-range sensing. Restraints include strong module-level customization, competition from radar, LiDAR, infrared and capacitive sensing, long automotive qualification cycles, and uncertain adoption speed for MEMS ultrasonic ToF sensors.

Industry Chain Analysis Upstream inputs include semiconductor wafers, MEMS process capacity, piezoelectric materials, CMOS/BCD process platforms, packaging substrates, ceramic or MEMS transducers, and test equipment. Midstream suppliers design ultrasonic driver ICs, AFE/TDC chips, ToF SoCs, PMUT/CMUT sensor chips, and HMI controller SoCs. Downstream customers include automotive Tier 1 suppliers, ultrasonic sensor module makers, smart meter OEMs, industrial sensor manufacturers, robotics companies, consumer electronics OEMs, and HMI module suppliers.

Segment Insights By chip function, automotive ultrasonic driver and signal processor ICs represent the largest segment because parking and low-speed ADAS systems use multiple ultrasonic sensors per vehicle. Ultrasonic AFE/TDC metering chips form a stable segment driven by smart water, heat and gas meters. MEMS ultrasonic ToF chips are smaller but growing as PMUT/CMUT integration opens new use cases in robotics, consumer electronics, and smart surfaces.

Downstream Market Opportunities The strongest opportunities are in automatic parking, autonomous valet parking, smart water metering, compact level sensing, service robots, drones, presence detection, and automotive smart surface HMI. Suppliers with system-level algorithms, low-power signal processing, automotive diagnostics, MEMS integration, and customer reference designs will capture higher value.

Regional Insights Europe leads automotive ultrasonic ICs through Elmos, Bosch, and ScioSense-related expertise. North America is strong in analog, mixed-signal, and ToF solutions through TI, Analog Devices, and UltraSense. Japan participates through TDK/InvenSense and PMUT-based sensor chips. China is expanding through NOVOSENSE, CR Micro, SonicMEMS, and Zhongke Shuiyan, supported by automotive localization and smart metering demand.

Competitive Landscape Analysis The market is led by Elmos in automotive ultrasonic ICs, TI and ADI in mixed-signal ultrasonic sensing and metering chips, Bosch in automotive sensor chipsets, TDK/InvenSense in MEMS ultrasonic ToF sensors, and ScioSense in ultrasonic flow converters. NOVOSENSE, CR Micro, SonicMEMS, and

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Zhongke Shuiyan represent emerging Chinese suppliers. Future competition will focus on integration level, low-power signal processing, MEMS transducer integration, automotive functional safety, interface compatibility, and design-in relationships with module and system customers.

Report Scope

This report studies the global Ultrasonic Sensor IC production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Ultrasonic Sensor IC total production and demand, 2021-2032, (Million Units)

Global Ultrasonic Sensor IC total production value, 2021-2032, (USD Million)

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

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

U.S. VS China: Ultrasonic Sensor IC domestic production, consumption, key domestic manufacturers and share

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

Global Ultrasonic Sensor IC production by Interface Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global Ultrasonic Sensor IC production by Application, production, value,

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CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global Ultrasonic Sensor 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 Elmos Semiconductor SE, Texas Instruments, Bosch Semiconductors, TDK Corporation, ScioSense B.V., Analog Devices, Inc., NOVOSENSE Microelectronics, UltraSense Systems, CR Micro, SonicMEMS, 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 Ultrasonic Sensor 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 Interface 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 Ultrasonic Sensor IC Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

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Rest of World

Global Ultrasonic Sensor IC Market, Segmentation by Interface Type:

LIN / DSI3 / Automotive Sensor Bus

UART / One-wire / Proprietary IO

SPI / I2C Digital Interface

Global Ultrasonic Sensor IC Market, Segmentation by Technology Architecture:

External Piezo Transducer + Driver/AFE IC

AFE + TDC Metering IC

PMUT-based Integrated Sensor Chip / SiP

CMUT-based Integrated Sensor Chip / SiP

Multimodal Ultrasonic Sensor SoC

Global Ultrasonic Sensor IC Market, Segmentation by Chip Function:

Ultrasonic Transducer Driver ICs

Ultrasonic AFE / Receiver ICs

Ultrasonic ToF / DSP SoCs

Ultrasonic TDC Metering Chips

MEMS Ultrasonic Sensor Chips

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Ultrasonic HMI Sensor SoCs

Global Ultrasonic Sensor IC Market, Segmentation by Application:

Automotive Parking and Low-speed ADAS

Smart Water / Heat / Gas Metering

Robotics and Drones

Consumer Electronics Proximity

HMI and Smart Surface

Industrial Level and Distance Sensing

Companies Profiled:

Elmos Semiconductor SE

Texas Instruments

Bosch Semiconductors

TDK Corporation

ScioSense B.V.

Analog Devices, Inc.

NOVOSENSE Microelectronics

UltraSense Systems

CR Micro

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SonicMEMS

Zhongke Shuiyan

Key Questions Answered:

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

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