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Global Ultrasound AFE IC Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Ultrasound AFE IC market size is expected to reach $ 1556 million by 2032, rising at a market growth of 8.0% CAGR during the forecast period (2026-2032).

Ultrasound AFE IC refers to a dedicated analog or mixed-signal integrated circuit that connects an ultrasonic transducer with a digital processing system by exciting, receiving, conditioning, measuring, and converting ultrasonic signals. The product typically integrates two or more core functions such as a low-noise amplifier, programmable or time-gain amplifier, anti-aliasing filter, analog-to-digital converter, comparator, time-to-digital converter, transmit/receive switch, high-voltage transmitter, digital signal processor, or communication interface. Principal product forms include multichannel receiver AFEs for ultrasound imaging, integrated transmit/receive LSIs, ultrasonic metering converters, ranging sensor ICs, highly integrated ultrasound ASSPs or SoCs, and custom ultrasound ASICs. Key technical parameters include channel count, input-referred noise, dynamic range, gain range, ADC resolution and sampling rate, time-of-flight resolution, transmit-drive capability, power consumption, operating frequency, package size, temperature range, and functional-safety capability. This study focuses on commercially supplied Ultrasound AFE IC products used in medical ultrasound imaging, ultrasonic flow metering, automotive ranging, industrial sensing, sonar, nondestructive testing, and other professional ultrasonic signal-chain applications.

Key Findings

Automotive and industrial ranging represented 46.39% of 2025 market revenue under the defined scope

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Medical and specialized imaging contributed 38.54%, while ultrasonic metering accounted for 15.07%

The top five suppliers represented approximately 75.71% of 2025 revenue across fragmented application niches

Fifteen parent-company-level suppliers qualified for the Core Formal List after subsidiary consolidation

Market Trends

Ultrasound AFE IC development is moving toward higher integration, greater channel density, lower per-channel power consumption, and more digital processing at the transducer or sensor node. In medical imaging, portable and in-probe systems increasingly require compact multichannel receiver architectures that combine low-noise amplification, gain control, filtering, ADCs, and digital interfaces in a restricted thermal envelope. Texas Instruments' 32-channel AFE5932, specified at 17 mW per channel with integrated 12-bit, 50-MSPS conversion, illustrates the continuing reduction in size and power for portable systems. Automotive architectures are evolving from threshold-based echo reporting toward envelope or raw-waveform output, enabling centralized processing and sensor fusion. Bosch's TB193/TB293 chipset captures original echo information at the transducer and transfers it through a high-data-rate interface for advanced parking functions. Ultrasonic metering products are similarly adding higher timing resolution, lower standby current, integrated processing, and more flexible transducer-drive options. Industry consolidation is also reinforcing system-level integration: ABLIC's acquisition of Socionext's medical ultrasound activities combined transmitter, receiver, firmware, and imaging capabilities within a broader solution platform.

Market Dynamics

Drivers

Demand growth is supported by portable medical imaging, vehicle sensing content, smart-meter replacement, industrial automation, and the wider deployment of robotic systems. Portable ultrasound increases demand for low-power, high-channel-count

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devices capable of delivering diagnostic image quality in smaller equipment. Automotive ultrasonic sensing benefits from a large vehicle production base and from the use of several sensing positions per vehicle in parking and low-speed maneuvering systems. OICA reported that global motor-vehicle production increased to 96.4 million units in 2025, providing a substantial volume foundation for automotive ultrasonic sensor ICs. Smart water, gas, and heat meters provide another recurring demand source because ultrasonic measurement offers low mechanical wear, bidirectional measurement capability, and compatibility with long-life battery operation. Industrial customers are also adopting ultrasonic ranging where low-light conditions, transparent objects, dust, or near-field detection limit the effectiveness of optical sensing.

Restraints

Market expansion is constrained by long qualification cycles, application-specific engineering requirements, and substantial differences between product architectures. Medical imaging devices require stable noise, gain, timing, and channel-matching performance over long equipment lifecycles, while automotive products must satisfy stringent temperature, reliability, diagnostics, and functional-safety requirements. These conditions extend design-in periods and increase development, validation, and software-support costs. The merchant market is further limited by proprietary ASICs developed or commissioned by large ultrasound-system and automotive suppliers for internal use. Price pressure is particularly significant in high-volume ranging applications, where semiconductor suppliers must balance lower unit prices against increasingly complex analog processing, digital interfaces, and safety functions. Supply-chain dependence on specialty analog processes, high-voltage devices, packaging, and calibrated production testing can also restrict rapid capacity substitution.

Opportunities

The strongest opportunities arise from in-probe medical electronics, raw-data automotive sensing, intelligent metering, and localized supply-chain development. Higher channel integration allows portable ultrasound manufacturers to reduce board area, wiring, power consumption, and the number of external components, supporting more compact diagnostic systems. Automotive products capable of providing raw echo or configurable envelope data can participate in centralized perception and AI-based sensor fusion rather than functioning only as isolated parking sensors. Smart-meter opportunities are expanding around ultra-low-power converters, leak detection, higher timing accuracy, and integration of measurement algorithms. China also presents

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opportunities for suppliers able to provide locally supported imaging, metering, and automotive products, as demonstrated by the expansion of official Ultrasound AFE IC and ultrasonic sensor IC portfolios among domestic semiconductor companies. Products such as HiSilicon's AC9810 and SENASIC's automotive ultrasonic sensor IC show that local suppliers are entering multiple technical segments rather than concentrating on a single low-end category.

Challenges

The industry faces persistent challenges in performance verification, customer qualification, market measurement, and competition from alternative sensing technologies. Channel count, integration level, package type, application-specific content, and customer pricing vary substantially, making shipment volume and average selling price difficult to compare across medical imaging, automotive ranging, and ultrasonic metering. New suppliers must demonstrate not only electrical performance but also long-term reliability, transducer compatibility, software tools, calibration capability, and stable mass-production quality. Camera, radar, optical time-of-flight, and other sensing technologies may reduce ultrasonic content in selected platforms, although they do not provide identical performance in every near-field environment. Commercial uncertainty is also created by captive ASIC programs, customer-specific products, limited financial disclosure from private suppliers, and long design cycles that can delay the conversion of product announcements into material revenue.

Industry Chain Analysis

The upstream Ultrasound AFE IC supply chain includes semiconductor design IP, specialty CMOS or BCD wafer processes, high-voltage devices, data-converter technology, packaging substrates, assembly and testing, electronic-design-automation tools, and ultrasonic transducers used for system validation. High-performance imaging devices require low-noise analog circuits, precise channel matching, high-speed ADCs, clocking, and thermally efficient packaging. Automotive and industrial products place greater emphasis on high-voltage drive, robust receiver protection, diagnostics, qualified interfaces, and wide-temperature reliability. Metering devices depend on precision timing, low-power analog design, and stable operation over long battery-powered service periods.

The midstream consists of integrated device manufacturers, fabless semiconductor

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suppliers, custom ASIC developers, and groups operating through specialized subsidiaries. Value is created through mixed-signal architecture, analog intellectual property, transducer matching, embedded firmware, calibration, product qualification, reference designs, and sustained technical support rather than through wafer processing alone. Downstream customers include medical-imaging manufacturers, automotive Tier 1 suppliers, smart-meter producers, industrial automation companies, robotics manufacturers, sonar developers, and nondestructive-testing equipment suppliers. Profitability is generally supported by design-in continuity and specialized intellectual property, but it is moderated by long development cycles, customer concentration, automotive price negotiation, and the cost of maintaining qualified manufacturing and test flows.

Segment Insights

Automotive and industrial ranging was the largest application segment in 2025, representing 46.39% of revenue under the report's defined scope. Its scale is driven by high unit shipments, multiple sensing positions in vehicle platforms, and broader use in robotics and industrial distance measurement. The segment has a lower average unit value than multichannel imaging, but increasingly integrated drivers, receivers, processing functions, diagnostics, and communication interfaces are supporting higher semiconductor content per sensor node. The transition toward raw-data access and centralized processing provides an additional path for product differentiation.

Medical and specialized imaging represented 38.54% of the market and remains the highest-value segment on a per-device basis. Performance is determined by channel density, noise, dynamic range, gain-control accuracy, ADC capability, power consumption, and system size. Ultrasonic metering accounted for 15.07%, with demand concentrated in water, gas, heat, and industrial-flow measurement. Although smaller in revenue share, metering offers attractive opportunities in low-power timing, long-life battery systems, leak detection, and precision measurement. The three segments should therefore be evaluated separately: imaging is performance- and qualification-driven, ranging is volume- and cost-driven, and metering is precision- and power-driven.

Downstream Market Opportunities

Medical ultrasound offers opportunities in handheld, point-of-care, wireless, and in-probe systems that require lower power and greater integration without sacrificing image quality. Automotive applications are expanding beyond conventional parking

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alerts toward automated maneuvering, near-field perception, raw-data processing, and fusion with camera or radar systems. Smart metering presents recurring demand from infrastructure modernization, leakage management, billing accuracy, and replacement of mechanical meters. Industrial automation and robotics add opportunities in obstacle detection, level measurement, presence sensing, and operation under environmental conditions that are difficult for optical sensors. The most attractive downstream programs are those in which the Ultrasound AFE IC becomes closely coupled with transducer characteristics, firmware, diagnostics, and system algorithms, because this increases design continuity and creates higher switching costs for the equipment manufacturer.

Regional Insights

No single region dominates every Ultrasound AFE IC application. North America represents the strongest high-value merchant supply base for multichannel medical imaging AFEs, supported by established analog-semiconductor companies with broad receiver, converter, and signal-chain portfolios. Europe has a stronger concentration of specialized automotive ultrasonic IC, ultrasonic flow-converter, and custom mixed-signal expertise. Official product portfolios from ELMOS and ScioSense demonstrate the region’s depth in automotive ranging, direct-drive sensor architectures, timing conversion, and smart metering. Japan is differentiated by highly integrated transmit/receive LSIs for compact ultrasound systems, reinforced by ABLIC’s expansion of its medical-ultrasound capabilities.

China has the fastest-expanding verified supplier base within the study, with products now covering multichannel imaging AFEs, ultrasonic metering ICs, automotive sensor interfaces, and integrated ranging SoCs. Local opportunities are supported by medical-device localization, smart-meter deployment, automotive semiconductor substitution, and demand for closer technical support. However, supplier scale, customer qualification, and financial transparency remain uneven. Taiwan participates mainly through embedded analog microcontrollers and semiconductor manufacturing services, while Southeast Asia has a more important role in assembly, testing, and regional supply-chain operations than in headquarters-level product ownership. South Korea, India, and the Middle East currently have limited numbers of verified merchant Ultrasound AFE IC suppliers under the report’s narrow product scope.

Competitive Landscape Analysis

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The competitive landscape combines a concentrated revenue structure with fragmented application leadership. The report's Core Formal List contains 15 parent-company-level suppliers, while the five largest are estimated to represent approximately 75.71% of 2025 revenue. Established U.S. analog-semiconductor companies retain strong positions in multichannel medical imaging because of their noise performance, converter integration, product breadth, development tools, and long equipment qualification history. Automotive competition is led by suppliers with proven high-voltage interfaces, sensor diagnostics, functional-safety development, and long vehicle-platform design cycles; onsemi and ELMOS represent established approaches, while Bosch is entering the merchant market with a raw-data-oriented chipset architecture. ScioSense is positioned around ultrasonic flow conversion and precision timing, while ABLIC differentiates through highly integrated transmit/receive LSIs for compact ultrasound equipment. Chinese suppliers are developing across imaging, metering, and automotive sensing, increasing regional product availability and competitive pressure, but most remain below the established leaders in disclosed scale, international customer coverage, and long-term production evidence. Competitive advantage is therefore determined less by nominal functional similarity than by qualified analog performance, transducer compatibility, software support, reliability, supply continuity, and the ability to secure long-duration customer designs.

Report Scope

This report studies the global Ultrasound AFE IC production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Ultrasound AFE IC total production and demand, 2021-2032, (Million Units)

Global Ultrasound AFE IC total production value, 2021-2032, (USD Million)

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

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

U.S. VS China: Ultrasound AFE IC domestic production, consumption, key domestic manufacturers and share

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

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

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

This report profiles key players in the global Ultrasound AFE 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 Huawei Investment & Holding Co., Ltd., Robert Bosch GmbH, Texas Instruments Incorporated, Analog Devices, Inc., TDK Corporation, MINEBEA MITSUMI Inc., ON Semiconductor Corporation, Ninestar Corporation, ELMOS Semiconductor SE, indie Semiconductor, Inc., 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 Ultrasound AFE IC market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Million Units) and average price

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(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 Ultrasound AFE IC Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Ultrasound AFE IC Market, Segmentation by Type:

Ultrasound Receiver AFE

Ultrasound Transmit/Receive AFE

Ultrasonic Ranging IC

Other Product Types

Global Ultrasound AFE IC Market, Segmentation by Level of

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Integration:

Analog Front End Only

AFE with ADC

AFE with Timing Engine

AFE with DSP or MCU

Other

Global Ultrasound AFE IC Market, Segmentation by Signal Conversion Architecture:

DC Sampling Architecture

Comparator-based Architecture

TDC-based Architecture

Envelope Detection Architecture

Other Architectures

Global Ultrasound AFE IC Market, Segmentation by Channel Count:

Single or Dual Channel

4–8 Channels

16 Channels

32 Channels

64 Channels

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More than 64 Channels

Other

Global Ultrasound AFE IC Market, Segmentation by Application:

Medical Ultrasound Imaging

Ultrasonic Metering

Automotive Ultrasonic Ranging

Industrial Ranging and Sensing

Other

Companies Profiled:

Huawei Investment & Holding Co., Ltd.

Robert Bosch GmbH

Texas Instruments Incorporated

Analog Devices, Inc.

TDK Corporation

MINEBEA MITSUMI Inc.

ON Semiconductor Corporation

Ninestar Corporation

ELMOS Semiconductor SE

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indie Semiconductor, Inc.

ScioSense B.V.

SENASIC Electronics Technology Co., Ltd.

Inbisen Semiconductor Co., Ltd.

Hangzhou RuiMeng Technology Co., Ltd.

Madeit Semiconductor Co., Ltd.

Key Questions Answered

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

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