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Global Active Noise Cancellation (ANC) TWS Earbud Chip Market Growth 2026-2032

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Abstracts

The global Active Noise Cancellation (ANC) TWS Earbud Chip market size is predicted to grow from US$ 4717 million in 2025 to US$ 7637 million in 2032; it is expected to grow at a CAGR of 7.3% from 2026 to 2032.

In 2024, the global production of Active Noise Cancellation (ANC) TWS Earbud Chip will reach 760 million units, with an average selling price of US$5.93 per unit. They are also entering the market with professional audio manufacturers like Harman, Sony, Skullcandy, Edifier, and 1MORE. They are also being used in smart audio products from internet companies like Google, Alibaba, and Baidu. Active noise cancellation (ANC) monitors background noise, uses chips and algorithmic models to calculate noise waves, and generates inverse sound waves. Active noise cancellation TWS earbud chips are Bluetooth audio system-on-chips (SoCs) with integrated active noise cancellation (ANC) functionality. Designed specifically for true wireless stereo (TWS) earbuds, they actively cancel out ambient noise through a combination of hardware and algorithms. This noise cancellation is achieved through the principle of superposition and cancellation. Currently, digital active noise cancellation is widely adopted in the industry. Whether feedforward, feedback, or a hybrid combination of the two, all rely on noise acquisition by a microphone, processing by a DSP/MCU, and then outputting inverse sound waves for noise reduction. Active noise cancellation can be categorized into three types: feedforward, feedback, and a hybrid combination of the two. Feedforward ANC headphones are typically located externally, collecting noise and feeding it to a DSP for processing, which then outputs inverse sound waves for noise reduction. Feedback ANC headphones have microphones located internally. The noise collected and fed to the DSP is essentially the same as what the ear hears, allowing for direct inverse processing. Hybrid ANC, combining these two approaches, can achieve faster and more effective noise reduction. At present, although the cost of hybrid active

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noise reduction is relatively higher, as the cost of chips and microphones decreases, this method that can bring a better listening experience will definitely become the first choice of manufacturers.

United States market for Active Noise Cancellation (ANC) TWS Earbud Chip is estimated to increase from US$ million in 2025 to US$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for Active Noise Cancellation (ANC) TWS Earbud Chip is estimated to increase from US$ million in 2025 to US$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for Active Noise Cancellation (ANC) TWS Earbud Chip is estimated to increase from US$ million in 2025 to US$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key Active Noise Cancellation (ANC) TWS Earbud Chip players cover Qualcomm, ams-OSRAM AG, Analog Devices, Airoha Technology, Broadcom, etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Active Noise Cancellation (ANC) TWS Earbud Chip Industry Forecast” looks at past sales and reviews total world Active Noise Cancellation (ANC) TWS Earbud Chip sales in 2025, providing a comprehensive analysis by region and market sector of projected Active Noise Cancellation (ANC) TWS Earbud Chip sales for 2026 through 2032. With Active Noise Cancellation (ANC) TWS Earbud Chip sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Active Noise Cancellation (ANC) TWS Earbud Chip industry.

This Insight Report provides a comprehensive analysis of the global Active Noise Cancellation (ANC) TWS Earbud Chip landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Active Noise Cancellation (ANC) TWS Earbud Chip portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global

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Active Noise Cancellation (ANC) TWS Earbud Chip market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Active Noise Cancellation (ANC) TWS Earbud Chip and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Active Noise Cancellation (ANC) TWS Earbud Chip.

This report presents a comprehensive overview, market shares, and growth opportunities of Active Noise Cancellation (ANC) TWS Earbud Chip market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Feed Forward & Feedback ANC

Hybrid ANC

Segmentation by Chip:

Bluetooth Single-chip SoC

Discrete Noise Cancellation Chip

Segmentation by Headphones:

OWS?Open Wearable Stereo?

TWS?True Wireless Stereo?

Segmentation by Control Circuit:

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Analog Solution

Digital Solution

Segmentation by Application:

High-end Headphones Market

Mid- and Low-end Headphones Market

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

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- Europe
  - Germany
  - France
  - UK
  - Italy
  - Russia
- Middle East & Africa
  - Egypt
  - South Africa
  - Israel
  - Turkey
  - GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

- Qualcomm
- ams-OSRAM AG
- Analog Devices
- Airoha Technology
- Broadcom

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Sony

Dialog Semiconductor

Bestechnic

Bose

Sennheiser

Apple

Airoha Technology Corp.

MediaTek

Shenzhen Qixin Microelectronics Co., Ltd.

Goodix Technology, Inc

WUQI Micro

Actions Technology Co., Ltd.

Realtek Semiconductor Corporation

Beken Corporation

Zhuhai Huilian Technology Co., Ltd.

Tome-sz

ThinkPlus Semi

Bestechnic (Shanghai) Co., Ltd.

Shenzhen Bluetrum Technology Co., Ltd.

Zhuhai JIELI Technology Co., Ltd.

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1More

Huawei

RealMega Microelectronisc technology (Shanghai) Co. Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Active Noise Cancellation (ANC) TWS Earbud Chip market?

What factors are driving Active Noise Cancellation (ANC) TWS Earbud Chip market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Active Noise Cancellation (ANC) TWS Earbud Chip market opportunities vary by end market size?

How does Active Noise Cancellation (ANC) TWS Earbud Chip break out by Type, by Application?

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