

Global Active Noise Control Chips Market Growth 2026-2032

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Abstracts

The global Active Noise Control Chips market size is predicted to grow from US\$ 1272 million in 2025 to US\$ 2364 million in 2032; it is expected to grow at a CAGR of 9.3% from 2026 to 2032.

Active noise control chips are dedicated or semi-dedicated audio processing chips that integrate acoustic signal capture, real-time digital signal processing, anti-phase signal generation, audio encoding and decoding, and system control. They are mainly used in headphones, automotive cabins, mobile terminals, smart voice devices, and industrial equipment to reduce external noise or equipment operating noise. Their basic operating logic is to capture noise signals through microphones, use internal filters, DSPs, or dedicated hardware modules to rapidly calculate the noise waveform, and then output a sound wave with the opposite phase so that the two signals cancel each other in the user's ear canal, vehicle cabin, or target sound field. Active noise control chips deal with dynamic sound fields, so they have high requirements for algorithm latency, microphone channels, power consumption, audio synchronization, acoustic structure adaptation, and mass-production calibration.

Active noise control chips are gradually becoming fundamental experience-enabling components in personal audio devices, smart cabins, and voice interaction devices. Their main uses include music playback noise cancellation, call noise reduction, ambient transparency, in-vehicle road noise cancellation, equipment operating noise suppression, and far-field voice pickup enhancement. Technically, active noise control chips are evolving toward digitalization, hybrid architectures, adaptive control, and AI-assisted tuning. For example, Qualcomm QCC5171 integrates third-generation ANC as a built-in hardware module to reduce power consumption and latency; Renesas DA7402 supports feedforward, feedback, and hybrid topologies, with disclosed specifications

including up to 35 dB noise cancellation, 25 microseconds input-to-output latency, and 8.5 mW stereo hybrid ANC playback power consumption.

The upstream market for active noise control chips mainly includes wafer foundry, analog and mixed-signal IP, audio DSPs, low-power Bluetooth, MEMS microphones, power management, packaging and testing, acoustic simulation software, and algorithm tuning tools. The downstream market covers headphone brands, smartphone manufacturers, automotive electronics suppliers, smart hardware companies, and industrial equipment manufacturers. Upstream process and packaging costs affect chip pricing and delivery capability; microphone consistency and acoustic structure affect the final noise cancellation effect; and downstream terminal brands' requirements for sound quality, battery life, size, and call experience continue to drive chip integration. In terms of the policy environment, although active noise control chips are not a standalone policy-supported category in most countries, they are indirectly supported by policies related to semiconductor localization, smart terminal upgrades, automotive electronics development, and supply chain security. China's efforts to promote stable growth in the electronic information manufacturing industry and improve the supply capacity of key components, as well as the United States' and Europe's efforts to strengthen local semiconductor manufacturing and supply chain resilience, will improve the industrial foundation for audio chips, automotive electronics chips, and smart hardware chips, while increasing terminal manufacturers' attention to localization, stable supply, and alternative solutions.

In the next few years, prices of active noise control chips are expected to show structural divergence. Integrated ANC SoCs for ordinary TWS earbuds will still face downward pressure on unit prices due to intensifying competition and improved supply of mature process capacity. In contrast, high-end hybrid ANC, adaptive ANC, multi-microphone, low-latency, automotive-grade, and AI voice enhancement solutions will show stronger price resilience because of higher barriers in algorithms, tuning, certification, and customer design-in. In terms of production volume, personal audio devices will remain the largest shipment base, while open-ear earbuds, over-ear headphone upgrades, and mid-range TWS penetration will continue to contribute scale. Automotive acoustic systems, smart cabins, industrial equipment noise reduction, and conferencing voice devices will bring new incremental demand, although their adoption cycles are relatively long. In the long term, the market will not rely solely on headphone replacement demand. The industry's value focus will shift from the cost of a single chip to algorithm ecosystems, hardware-software collaboration, and stable terminal experience, while gradually penetrating the automotive industry and industrial manufacturing fields.

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

This Insight Report provides a comprehensive analysis of the global Active Noise Control Chips 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 Control Chips portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Active Noise Control Chips market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Active Noise Control Chips and breaks down the forecast by Signal Processing Method, 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 Control Chips.

This report presents a comprehensive overview, market shares, and growth opportunities of Active Noise Control Chips market by product type, application, key manufacturers and key regions and countries.

Segmentation by Signal Processing Method:

Analog ANC Chip

Digital ANC Chip

Mixed-Signal ANC Chip

Segmentation by Microphone Channel Count:

Single-Microphone ANC Chip

Dual-Microphone ANC Chip

Three-Microphone ANC Chip

Multi-Microphone ANC Chip

Segmentation by Operating Principle:

Feedforward ANC Chip

Feedback ANC Chip

Hybrid ANC Chip

Other ANC Chip

Segmentation by Application:

Personal Audio Devices

Automotive Acoustic Systems

Industrial Equipment Noise Control

Other Applications

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

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

Airoha Technology

Bestechnic

Bluetrum

Zhuhai JieLi Technology

Analog Devices

Renesas Electronics

NXP

ams OSRAM

Cirrus Logic

XMOS

Realtek

Asahi Kasei Microdevices

Apple

Sony

Key Questions Addressed in this Report

What is the 10-year outlook for the global Active Noise Control Chips market?

What factors are driving Active Noise Control Chips market growth, globally and by region?

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

How do Active Noise Control Chips market opportunities vary by end market size?

How does Active Noise Control Chips break out by Signal Processing Method, by Application?

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