

Global Automotive MCU Functional Chips Market Growth 2026-2032

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Abstracts

The global Automotive MCU Functional Chips market size is predicted to grow from US\$ 6711 million in 2025 to US\$ 8642 million in 2032; it is expected to grow at a CAGR of 5.8% from 2026 to 2032.

Global sales of automotive MCU functional chips are expected to reach 9.8 billion units in 2025, with an average selling price of approximately US\$0.7 per unit.

Automotive MCU function chips are embedded chips that integrate a CPU, memory, I/O interfaces, and peripherals. As the core of the automotive electronic control unit (ECU), they are responsible for real-time processing of sensor data, executing control algorithms, and driving actuators. These chips cover scenarios such as engine management, body control, smart cockpits, and autonomous driving. Their core features include low power consumption, high reliability, and wide operating temperature, and they must meet automotive-grade certification standards. The upstream segment focuses on core materials and equipment: semiconductor materials such as silicon wafers and photoresists support chip manufacturing, while equipment such as lithography machines and etching machines enable high-precision processes. The midstream encompasses chip design and manufacturing, with design companies developing customized solutions based on the ARM Cortex-M series cores, and foundries balancing performance and cost using 28nm/40nm processes. The downstream segment encompasses automotive applications and system integration, with automakers and Tier 1 suppliers embedding MCUs into powertrain, chassis, and cockpit systems, optimizing functionality through over-the-air (OTA) upgrades.

The primary market drivers include the following:

Automotive electrification and the upgrading of electrical/electronic (E/E) architectures serve as the core drivers for the growing demand for automotive MCU functional chips. Compared to traditional fuel-powered vehicles, new energy vehicles (NEVs) are equipped with a significantly higher number of electronic control units (ECUs). Functions such as power battery management, main drive inverters, on-board chargers (OBCs), DC-DC converters, thermal management, body control, cockpit control, and chassis control all rely on MCUs to perform real-time control, status monitoring, communication coordination, and safety protection tasks. As vehicle E/E architectures evolve from distributed ECU systems toward domain control, zonal control, and 'software-defined vehicles,' MCUs are no longer merely simple execution controllers; instead, they serve as foundational chips responsible for edge control, functional safety, diagnostics, communication, and redundancy management. Infineon, for instance, explicitly links automotive MCUs with software-defined vehicles, electrification, cybersecurity, and real-time control, underscoring the continuously elevating foundational status of MCUs within the new generation of automotive electronic architectures.

The proliferation of features related to intelligent driving, smart cockpits, and in-vehicle networking is driving the evolution of MCUs toward higher performance, enhanced security, and multi-interface capabilities. The continuous expansion of functions—including ADAS (Advanced Driver-Assistance Systems), automated parking, electronic rearview mirrors, intelligent lighting, cockpit interaction, in-vehicle Ethernet, body domain control, and sensor fusion—necessitates that automotive MCUs possess greater computing power, higher communication bandwidth, a richer array of peripheral interfaces, and more robust functional safety mechanisms. While automotive MCUs in the past primarily served simple discrete control (switching) tasks and low-speed communication, future MCUs will be required to work in close coordination with SoCs, sensors, power management chips, driver ICs, and memory modules to support increasingly complex software functions and real-time control tasks. Infineon's acquisition of Marvell's automotive Ethernet business—along with its strategic moves to bolster its capabilities in automotive MCUs and in-vehicle networking—reflects the accelerating convergence of in-vehicle communication, MCUs, and software-defined vehicles.

Rising demands for supply chain security, domestic substitution, and automotive-grade reliability are driving an optimization of the market structure. Automotive MCUs must satisfy stringent requirements regarding long-term supply availability, wide-temperature operation, interference immunity, functional safety, cybersecurity, and high-reliability validation; consequently, they entail lengthy certification cycles, foster strong customer

stickiness, and present high barriers to entry. Following the global automotive chip shortage, OEMs and Tier 1 suppliers have placed greater emphasis on multi-sourcing strategies, long-term capacity assurance, and the development of localized supply chains. This shift is accelerating the adoption of domestic MCU solutions across various automotive domains, including body control, cockpit systems, BMS, gateways, chassis control, and zonal control units. Furthermore, competition within the automotive-grade MCU sector is no longer solely a battle over cost; rather, it has evolved into a comprehensive contest encompassing ecosystems, toolchains, software platforms, functional safety documentation, customer support, and mass-production expertise. Moving forward, companies that possess automotive-grade certification, ensure stable supply, facilitate hardware-software co-optimization, and offer system-level solutions will be best positioned to seize greater opportunities within the automotive MCU market.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Automotive MCU Functional Chips 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 Automotive MCU Functional Chips.

This report presents a comprehensive overview, market shares, and growth opportunities of Automotive MCU Functional Chips market by product type, application,

key manufacturers and key regions and countries.

Segmentation by Type:

8-bit MCU

16-bit MCU

32-bit MCU

Segmentation by Product Architecture:

Based on 8051 Architecture

Based on ARM Architecture

Based on RISC-V Architecture

Segmentation by Function:

Powertrain Control

Battery Management

In-Vehicle Infotainment Systems

Advanced Driver Assistance Systems (ADAS)

Segmentation by Sales Channel:

Online Sales

Offline Sales

Segmentation by Application:

Passenger Vehicles

Commercial Vehicles

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.

Infineon Technologies?DE?

NXP Semiconductors?NL?

Renesas Electronics?JP?

Texas Instruments?US?

STMicroelectronics?CH?

ON Semiconductor?US?

Microchip Technology?US?

Micron Technology?US?

Samsung Electronics?KR?

GigaDevice?CN?

Beijing SiChip / Beijing Ingenic?CN?

Analog Devices?US?

Nanya Technology?TW?

SemiDrive Technology?CN?

Horizon Robotics?CN?

Star Semiconductor?CN?

Key Questions Addressed in this Report

What is the 10-year outlook for the global Automotive MCU Functional Chips market?

What factors are driving Automotive MCU Functional Chips market growth, globally and by region?

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

How do Automotive MCU Functional Chips market opportunities vary by end market size?

How does Automotive MCU Functional Chips break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global Automotive MCU Functional Chips Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for Automotive MCU Functional Chips by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for Automotive MCU Functional Chips by Country/Region, 2021, 2025 & 2032
- 2.2 Automotive MCU Functional Chips Segment by Type
 - 2.2.1 8-bit MCU
 - 2.2.2 16-bit MCU
 - 2.2.3 32-bit MCU
 - 2.2.4 Automotive MCU Functional Chips Sales by Type
 - 2.2.4.1 Global Automotive MCU Functional Chips Sales Market Share by Type (2021-2026)
 - 2.2.4.2 Global Automotive MCU Functional Chips Revenue and Market Share by Type (2021-2026)
 - 2.2.4.3 Global Automotive MCU Functional Chips Sale Price by Type (2021-2026)
- 2.3 Automotive MCU Functional Chips Segment by Product Architecture
 - 2.3.1 Based on 8051 Architecture
 - 2.3.2 Based on ARM Architecture
 - 2.3.3 Based on RISC-V Architecture
 - 2.3.4 Automotive MCU Functional Chips Sales by Product Architecture
 - 2.3.4.1 Global Automotive MCU Functional Chips Sales Market Share by Product Architecture (2021-2026)
 - 2.3.4.2 Global Automotive MCU Functional Chips Revenue and Market Share by

Product Architecture (2021-2026)

2.3.4.3 Global Automotive MCU Functional Chips Sale Price by Product Architecture (2021-2026)

2.4 Automotive MCU Functional Chips Segment by Function

2.4.1 Powertrain Control

2.4.2 Battery Management

2.4.3 In-Vehicle Infotainment Systems

2.4.4 Advanced Driver Assistance Systems (ADAS)

2.4.5 Automotive MCU Functional Chips Sales by Function

2.4.5.1 Global Automotive MCU Functional Chips Sales Market Share by Function (2021-2026)

2.4.5.2 Global Automotive MCU Functional Chips Revenue and Market Share by Function (2021-2026)

2.4.5.3 Global Automotive MCU Functional Chips Sale Price by Function (2021-2026)

2.5 Automotive MCU Functional Chips Segment by Sales Channel

2.5.1 Online Sales

2.5.2 Offline Sales

2.5.3 Automotive MCU Functional Chips Sales by Sales Channel

2.5.3.1 Global Automotive MCU Functional Chips Sales Market Share by Sales Channel (2021-2026)

2.5.3.2 Global Automotive MCU Functional Chips Revenue and Market Share by Sales Channel (2021-2026)

2.5.3.3 Global Automotive MCU Functional Chips Sale Price by Sales Channel (2021-2026)

2.6 Automotive MCU Functional Chips Segment by Application

2.6.1 Passenger Vehicles

2.6.2 Commercial Vehicles

2.6.3 Automotive MCU Functional Chips Sales by Application

2.6.3.1 Global Automotive MCU Functional Chips Sale Market Share by Application (2021-2026)

2.6.3.2 Global Automotive MCU Functional Chips Revenue and Market Share by Application (2021-2026)

2.6.3.3 Global Automotive MCU Functional Chips Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Automotive MCU Functional Chips Breakdown Data by Company

3.1.1 Global Automotive MCU Functional Chips Annual Sales by Company

(2021-2026)

3.1.2 Global Automotive MCU Functional Chips Sales Market Share by Company

(2021-2026)

3.2 Global Automotive MCU Functional Chips Annual Revenue by Company

(2021-2026)

3.2.1 Global Automotive MCU Functional Chips Revenue by Company (2021-2026)

3.2.2 Global Automotive MCU Functional Chips Revenue Market Share by Company

(2021-2026)

3.3 Global Automotive MCU Functional Chips Sale Price by Company

3.4 Key Manufacturers Automotive MCU Functional Chips Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Automotive MCU Functional Chips Product Location Distribution

3.4.2 Players Automotive MCU Functional Chips Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR AUTOMOTIVE MCU FUNCTIONAL CHIPS BY GEOGRAPHIC REGION

4.1 World Historic Automotive MCU Functional Chips Market Size by Geographic Region (2021-2026)

4.1.1 Global Automotive MCU Functional Chips Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Automotive MCU Functional Chips Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Automotive MCU Functional Chips Market Size by Country/Region (2021-2026)

4.2.1 Global Automotive MCU Functional Chips Annual Sales by Country/Region (2021-2026)

4.2.2 Global Automotive MCU Functional Chips Annual Revenue by Country/Region (2021-2026)

4.3 Americas Automotive MCU Functional Chips Sales Growth

4.4 APAC Automotive MCU Functional Chips Sales Growth

4.5 Europe Automotive MCU Functional Chips Sales Growth

4.6 Middle East & Africa Automotive MCU Functional Chips Sales Growth

5 AMERICAS

5.1 Americas Automotive MCU Functional Chips Sales by Country

5.1.1 Americas Automotive MCU Functional Chips Sales by Country (2021-2026)

5.1.2 Americas Automotive MCU Functional Chips Revenue by Country (2021-2026)

5.2 Americas Automotive MCU Functional Chips Sales by Type (2021-2026)

5.3 Americas Automotive MCU Functional Chips Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Automotive MCU Functional Chips Sales by Region

6.1.1 APAC Automotive MCU Functional Chips Sales by Region (2021-2026)

6.1.2 APAC Automotive MCU Functional Chips Revenue by Region (2021-2026)

6.2 APAC Automotive MCU Functional Chips Sales by Type (2021-2026)

6.3 APAC Automotive MCU Functional Chips Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Automotive MCU Functional Chips by Country

7.1.1 Europe Automotive MCU Functional Chips Sales by Country (2021-2026)

7.1.2 Europe Automotive MCU Functional Chips Revenue by Country (2021-2026)

7.2 Europe Automotive MCU Functional Chips Sales by Type (2021-2026)

7.3 Europe Automotive MCU Functional Chips Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Automotive MCU Functional Chips by Country

8.1.1 Middle East & Africa Automotive MCU Functional Chips Sales by Country (2021-2026)

8.1.2 Middle East & Africa Automotive MCU Functional Chips Revenue by Country (2021-2026)

8.2 Middle East & Africa Automotive MCU Functional Chips Sales by Type (2021-2026)

8.3 Middle East & Africa Automotive MCU Functional Chips Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Automotive MCU Functional Chips

10.3 Manufacturing Process Analysis of Automotive MCU Functional Chips

10.4 Industry Chain Structure of Automotive MCU Functional Chips

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Automotive MCU Functional Chips Distributors

11.3 Automotive MCU Functional Chips Customer

12 WORLD FORECAST REVIEW FOR AUTOMOTIVE MCU FUNCTIONAL CHIPS BY GEOGRAPHIC REGION

12.1 Global Automotive MCU Functional Chips Market Size Forecast by Region

12.1.1 Global Automotive MCU Functional Chips Forecast by Region (2027-2032)

12.1.2 Global Automotive MCU Functional Chips Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Automotive MCU Functional Chips Forecast by Type (2027-2032)

12.7 Global Automotive MCU Functional Chips Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Infineon Technologies?DE?

13.1.1 Infineon Technologies?DE? Company Information

13.1.2 Infineon Technologies?DE? Automotive MCU Functional Chips Product Portfolios and Specifications

13.1.3 Infineon Technologies?DE? Automotive MCU Functional Chips Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Infineon Technologies?DE? Main Business Overview

13.1.5 Infineon Technologies?DE? Latest Developments

13.2 NXP Semiconductors?NL?

13.2.1 NXP Semiconductors?NL? Company Information

13.2.2 NXP Semiconductors?NL? Automotive MCU Functional Chips Product Portfolios and Specifications

13.2.3 NXP Semiconductors?NL? Automotive MCU Functional Chips Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 NXP Semiconductors?NL? Main Business Overview

13.2.5 NXP Semiconductors?NL? Latest Developments

13.3 Renesas Electronics?JP?

13.3.1 Renesas Electronics?JP? Company Information

13.3.2 Renesas Electronics?JP? Automotive MCU Functional Chips Product Portfolios and Specifications

13.3.3 Renesas Electronics?JP? Automotive MCU Functional Chips Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 Renesas Electronics?JP? Main Business Overview

- 13.3.5 Renesas Electronics?JP? Latest Developments
- 13.4 Texas Instruments?US?
 - 13.4.1 Texas Instruments?US? Company Information
 - 13.4.2 Texas Instruments?US? Automotive MCU Functional Chips Product Portfolios and Specifications
 - 13.4.3 Texas Instruments?US? Automotive MCU Functional Chips Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.4.4 Texas Instruments?US? Main Business Overview
 - 13.4.5 Texas Instruments?US? Latest Developments
- 13.5 STMicroelectronics?CH?
 - 13.5.1 STMicroelectronics?CH? Company Information
 - 13.5.2 STMicroelectronics?CH? Automotive MCU Functional Chips Product Portfolios and Specifications
 - 13.5.3 STMicroelectronics?CH? Automotive MCU Functional Chips Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.5.4 STMicroelectronics?CH? Main Business Overview
 - 13.5.5 STMicroelectronics?CH? Latest Developments
- 13.6 ON Semiconductor?US?
 - 13.6.1 ON Semiconductor?US? Company Information
 - 13.6.2 ON Semiconductor?US? Automotive MCU Functional Chips Product Portfolios and Specifications
 - 13.6.3 ON Semiconductor?US? Automotive MCU Functional Chips Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.6.4 ON Semiconductor?US? Main Business Overview
 - 13.6.5 ON Semiconductor?US? Latest Developments
- 13.7 Microchip Technology?US?
 - 13.7.1 Microchip Technology?US? Company Information
 - 13.7.2 Microchip Technology?US? Automotive MCU Functional Chips Product Portfolios and Specifications
 - 13.7.3 Microchip Technology?US? Automotive MCU Functional Chips Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.7.4 Microchip Technology?US? Main Business Overview
 - 13.7.5 Microchip Technology?US? Latest Developments
- 13.8 Micron Technology?US?
 - 13.8.1 Micron Technology?US? Company Information
 - 13.8.2 Micron Technology?US? Automotive MCU Functional Chips Product Portfolios and Specifications
 - 13.8.3 Micron Technology?US? Automotive MCU Functional Chips Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.8.4 Micron Technology?US? Main Business Overview
- 13.8.5 Micron Technology?US? Latest Developments
- 13.9 Samsung Electronics?KR?
 - 13.9.1 Samsung Electronics?KR? Company Information
 - 13.9.2 Samsung Electronics?KR? Automotive MCU Functional Chips Product Portfolios and Specifications
 - 13.9.3 Samsung Electronics?KR? Automotive MCU Functional Chips Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.9.4 Samsung Electronics?KR? Main Business Overview
 - 13.9.5 Samsung Electronics?KR? Latest Developments
- 13.10 GigaDevice?CN?
 - 13.10.1 GigaDevice?CN? Company Information
 - 13.10.2 GigaDevice?CN? Automotive MCU Functional Chips Product Portfolios and Specifications
 - 13.10.3 GigaDevice?CN? Automotive MCU Functional Chips Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.10.4 GigaDevice?CN? Main Business Overview
 - 13.10.5 GigaDevice?CN? Latest Developments
- 13.11 Beijing SiChip / Beijing Ingenic?CN?
 - 13.11.1 Beijing SiChip / Beijing Ingenic?CN? Company Information
 - 13.11.2 Beijing SiChip / Beijing Ingenic?CN? Automotive MCU Functional Chips Product Portfolios and Specifications
 - 13.11.3 Beijing SiChip / Beijing Ingenic?CN? Automotive MCU Functional Chips Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.11.4 Beijing SiChip / Beijing Ingenic?CN? Main Business Overview
 - 13.11.5 Beijing SiChip / Beijing Ingenic?CN? Latest Developments
- 13.12 Analog Devices?US?
 - 13.12.1 Analog Devices?US? Company Information
 - 13.12.2 Analog Devices?US? Automotive MCU Functional Chips Product Portfolios and Specifications
 - 13.12.3 Analog Devices?US? Automotive MCU Functional Chips Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.12.4 Analog Devices?US? Main Business Overview
 - 13.12.5 Analog Devices?US? Latest Developments
- 13.13 Nanya Technology?TW?
 - 13.13.1 Nanya Technology?TW? Company Information
 - 13.13.2 Nanya Technology?TW? Automotive MCU Functional Chips Product Portfolios and Specifications
 - 13.13.3 Nanya Technology?TW? Automotive MCU Functional Chips Sales, Revenue,

Price and Gross Margin (2021-2026)

13.13.4 Nanya Technology?TW? Main Business Overview

13.13.5 Nanya Technology?TW? Latest Developments

13.14 SemiDrive Technology?CN?

13.14.1 SemiDrive Technology?CN? Company Information

13.14.2 SemiDrive Technology?CN? Automotive MCU Functional Chips Product

Portfolios and Specifications

13.14.3 SemiDrive Technology?CN? Automotive MCU Functional Chips Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 SemiDrive Technology?CN? Main Business Overview

13.14.5 SemiDrive Technology?CN? Latest Developments

13.15 Horizon Robotics?CN?

13.15.1 Horizon Robotics?CN? Company Information

13.15.2 Horizon Robotics?CN? Automotive MCU Functional Chips Product Portfolios and Specifications

13.15.3 Horizon Robotics?CN? Automotive MCU Functional Chips Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 Horizon Robotics?CN? Main Business Overview

13.15.5 Horizon Robotics?CN? Latest Developments

13.16 Star Semiconductor?CN?

13.16.1 Star Semiconductor?CN? Company Information

13.16.2 Star Semiconductor?CN? Automotive MCU Functional Chips Product

Portfolios and Specifications

13.16.3 Star Semiconductor?CN? Automotive MCU Functional Chips Sales, Revenue, Price and Gross Margin (2021-2026)

13.16.4 Star Semiconductor?CN? Main Business Overview

13.16.5 Star Semiconductor?CN? Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Automotive MCU Functional Chips Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Automotive MCU Functional Chips Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of 8-bit MCU

Table 4. Major Players of 16-bit MCU

Table 5. Major Players of 32-bit MCU

Table 6. Global Automotive MCU Functional Chips Sales by Type (2021-2026) & (Million Units)

Table 7. Global Automotive MCU Functional Chips Sales Market Share by Type (2021-2026)

Table 8. Global Automotive MCU Functional Chips Revenue by Type (2021-2026) & (\$ million)

Table 9. Global Automotive MCU Functional Chips Revenue Market Share by Type (2021-2026)

Table 10. Global Automotive MCU Functional Chips Sale Price by Type (2021-2026) & (US\$/Unit)

Table 11. Major Players of Based on 8051 Architecture

Table 12. Major Players of Based on ARM Architecture

Table 13. Major Players of Based on RISC-V Architecture

Table 14. Global Automotive MCU Functional Chips Sales by Product Architecture (2021-2026) & (Million Units)

Table 15. Global Automotive MCU Functional Chips Sales Market Share by Product Architecture (2021-2026)

Table 16. Global Automotive MCU Functional Chips Revenue by Product Architecture (2021-2026) & (\$ million)

Table 17. Global Automotive MCU Functional Chips Revenue Market Share by Product Architecture (2021-2026)

Table 18. Global Automotive MCU Functional Chips Sale Price by Product Architecture (2021-2026) & (US\$/Unit)

Table 19. Major Players of Powertrain Control

Table 20. Major Players of Battery Management

Table 21. Major Players of In-Vehicle Infotainment Systems

Table 22. Major Players of Advanced Driver Assistance Systems (ADAS)

Table 23. Global Automotive MCU Functional Chips Sales by Function (2021-2026) &

(Million Units)

Table 24. Global Automotive MCU Functional Chips Sales Market Share by Function (2021-2026)

Table 25. Global Automotive MCU Functional Chips Revenue by Function (2021-2026) & (\$ million)

Table 26. Global Automotive MCU Functional Chips Revenue Market Share by Function (2021-2026)

Table 27. Global Automotive MCU Functional Chips Sale Price by Function (2021-2026) & (US\$/Unit)

Table 28. Major Players of Online Sales

Table 29. Major Players of Offline Sales

Table 30. Global Automotive MCU Functional Chips Sales by Sales Channel (2021-2026) & (Million Units)

Table 31. Global Automotive MCU Functional Chips Sales Market Share by Sales Channel (2021-2026)

Table 32. Global Automotive MCU Functional Chips Revenue by Sales Channel (2021-2026) & (\$ million)

Table 33. Global Automotive MCU Functional Chips Revenue Market Share by Sales Channel (2021-2026)

Table 34. Global Automotive MCU Functional Chips Sale Price by Sales Channel (2021-2026) & (US\$/Unit)

Table 35. Global Automotive MCU Functional Chips Sale by Application (2021-2026) & (Million Units)

Table 36. Global Automotive MCU Functional Chips Sale Market Share by Application (2021-2026)

Table 37. Global Automotive MCU Functional Chips Revenue by Application (2021-2026) & (\$ million)

Table 38. Global Automotive MCU Functional Chips Revenue Market Share by Application (2021-2026)

Table 39. Global Automotive MCU Functional Chips Sale Price by Application (2021-2026) & (US\$/Unit)

Table 40. Global Automotive MCU Functional Chips Sales by Company (2021-2026) & (Million Units)

Table 41. Global Automotive MCU Functional Chips Sales Market Share by Company (2021-2026)

Table 42. Global Automotive MCU Functional Chips Revenue by Company (2021-2026) & (\$ millions)

Table 43. Global Automotive MCU Functional Chips Revenue Market Share by Company (2021-2026)

Table 44. Global Automotive MCU Functional Chips Sale Price by Company (2021-2026) & (US\$/Unit)
Table 45. Key Manufacturers Automotive MCU Functional Chips Producing Area Distribution and Sales Area
Table 46. Players Automotive MCU Functional Chips Products Offered
Table 47. Automotive MCU Functional Chips Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 48. New Products and Potential Entrants
Table 49. Market M&A Activity & Strategy
Table 50. Global Automotive MCU Functional Chips Sales by Geographic Region (2021-2026) & (Million Units)
Table 51. Global Automotive MCU Functional Chips Sales Market Share Geographic Region (2021-2026)
Table 52. Global Automotive MCU Functional Chips Revenue by Geographic Region (2021-2026) & (\$ millions)
Table 53. Global Automotive MCU Functional Chips Revenue Market Share by Geographic Region (2021-2026)
Table 54. Global Automotive MCU Functional Chips Sales by Country/Region (2021-2026) & (Million Units)
Table 55. Global Automotive MCU Functional Chips Sales Market Share by Country/Region (2021-2026)
Table 56. Global Automotive MCU Functional Chips Revenue by Country/Region (2021-2026) & (\$ millions)
Table 57. Global Automotive MCU Functional Chips Revenue Market Share by Country/Region (2021-2026)
Table 58. Americas Automotive MCU Functional Chips Sales by Country (2021-2026) & (Million Units)
Table 59. Americas Automotive MCU Functional Chips Sales Market Share by Country (2021-2026)
Table 60. Americas Automotive MCU Functional Chips Revenue by Country (2021-2026) & (\$ millions)
Table 61. Americas Automotive MCU Functional Chips Sales by Type (2021-2026) & (Million Units)
Table 62. Americas Automotive MCU Functional Chips Sales by Application (2021-2026) & (Million Units)
Table 63. APAC Automotive MCU Functional Chips Sales by Region (2021-2026) & (Million Units)
Table 64. APAC Automotive MCU Functional Chips Sales Market Share by Region (2021-2026)

Table 65. APAC Automotive MCU Functional Chips Revenue by Region (2021-2026) & (\$ millions)

Table 66. APAC Automotive MCU Functional Chips Sales by Type (2021-2026) & (Million Units)

Table 67. APAC Automotive MCU Functional Chips Sales by Application (2021-2026) & (Million Units)

Table 68. Europe Automotive MCU Functional Chips Sales by Country (2021-2026) & (Million Units)

Table 69. Europe Automotive MCU Functional Chips Revenue by Country (2021-2026) & (\$ millions)

Table 70. Europe Automotive MCU Functional Chips Sales by Type (2021-2026) & (Million Units)

Table 71. Europe Automotive MCU Functional Chips Sales by Application (2021-2026) & (Million Units)

Table 72. Middle East & Africa Automotive MCU Functional Chips Sales by Country (2021-2026) & (Million Units)

Table 73. Middle East & Africa Automotive MCU Functional Chips Revenue Market Share by Country (2021-2026)

Table 74. Middle East & Africa Automotive MCU Functional Chips Sales by Type (2021-2026) & (Million Units)

Table 75. Middle East & Africa Automotive MCU Functional Chips Sales by Application (2021-2026) & (Million Units)

Table 76. Key Market Drivers & Growth Opportunities of Automotive MCU Functional Chips

Table 77. Key Market Challenges & Risks of Automotive MCU Functional Chips

Table 78. Key Industry Trends of Automotive MCU Functional Chips

Table 79. Automotive MCU Functional Chips Raw Material

Table 80. Key Suppliers of Raw Materials

Table 81. Automotive MCU Functional Chips Distributors List

Table 82. Automotive MCU Functional Chips Customer List

Table 83. Global Automotive MCU Functional Chips Sales Forecast by Region (2027-2032) & (Million Units)

Table 84. Global Automotive MCU Functional Chips Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 85. Americas Automotive MCU Functional Chips Sales Forecast by Country (2027-2032) & (Million Units)

Table 86. Americas Automotive MCU Functional Chips Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 87. APAC Automotive MCU Functional Chips Sales Forecast by Region

(2027-2032) & (Million Units)

Table 88. APAC Automotive MCU Functional Chips Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 89. Europe Automotive MCU Functional Chips Sales Forecast by Country (2027-2032) & (Million Units)

Table 90. Europe Automotive MCU Functional Chips Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 91. Middle East & Africa Automotive MCU Functional Chips Sales Forecast by Country (2027-2032) & (Million Units)

Table 92. Middle East & Africa Automotive MCU Functional Chips Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 93. Global Automotive MCU Functional Chips Sales Forecast by Type (2027-2032) & (Million Units)

Table 94. Global Automotive MCU Functional Chips Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 95. Global Automotive MCU Functional Chips Sales Forecast by Application (2027-2032) & (Million Units)

Table 96. Global Automotive MCU Functional Chips Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 97. Infineon Technologies?DE? Basic Information, Automotive MCU Functional Chips Manufacturing Base, Sales Area and Its Competitors

Table 98. Infineon Technologies?DE? Automotive MCU Functional Chips Product Portfolios and Specifications

Table 99. Infineon Technologies?DE? Automotive MCU Functional Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 100. Infineon Technologies?DE? Main Business

Table 101. Infineon Technologies?DE? Latest Developments

Table 102. NXP Semiconductors?NL? Basic Information, Automotive MCU Functional Chips Manufacturing Base, Sales Area and Its Competitors

Table 103. NXP Semiconductors?NL? Automotive MCU Functional Chips Product Portfolios and Specifications

Table 104. NXP Semiconductors?NL? Automotive MCU Functional Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 105. NXP Semiconductors?NL? Main Business

Table 106. NXP Semiconductors?NL? Latest Developments

Table 107. Renesas Electronics?JP? Basic Information, Automotive MCU Functional Chips Manufacturing Base, Sales Area and Its Competitors

Table 108. Renesas Electronics?JP? Automotive MCU Functional Chips Product Portfolios and Specifications

Table 109. Renesas Electronics?JP? Automotive MCU Functional Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 110. Renesas Electronics?JP? Main Business

Table 111. Renesas Electronics?JP? Latest Developments

Table 112. Texas Instruments?US? Basic Information, Automotive MCU Functional Chips Manufacturing Base, Sales Area and Its Competitors

Table 113. Texas Instruments?US? Automotive MCU Functional Chips Product Portfolios and Specifications

Table 114. Texas Instruments?US? Automotive MCU Functional Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 115. Texas Instruments?US? Main Business

Table 116. Texas Instruments?US? Latest Developments

Table 117. STMicroelectronics?CH? Basic Information, Automotive MCU Functional Chips Manufacturing Base, Sales Area and Its Competitors

Table 118. STMicroelectronics?CH? Automotive MCU Functional Chips Product Portfolios and Specifications

Table 119. STMicroelectronics?CH? Automotive MCU Functional Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 120. STMicroelectronics?CH? Main Business

Table 121. STMicroelectronics?CH? Latest Developments

Table 122. ON Semiconductor?US? Basic Information, Automotive MCU Functional Chips Manufacturing Base, Sales Area and Its Competitors

Table 123. ON Semiconductor?US? Automotive MCU Functional Chips Product Portfolios and Specifications

Table 124. ON Semiconductor?US? Automotive MCU Functional Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 125. ON Semiconductor?US? Main Business

Table 126. ON Semiconductor?US? Latest Developments

Table 127. Microchip Technology?US? Basic Information, Automotive MCU Functional Chips Manufacturing Base, Sales Area and Its Competitors

Table 128. Microchip Technology?US? Automotive MCU Functional Chips Product Portfolios and Specifications

Table 129. Microchip Technology?US? Automotive MCU Functional Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 130. Microchip Technology?US? Main Business

Table 131. Microchip Technology?US? Latest Developments

Table 132. Micron Technology?US? Basic Information, Automotive MCU Functional Chips Manufacturing Base, Sales Area and Its Competitors

Table 133. Micron Technology?US? Automotive MCU Functional Chips Product

Portfolios and Specifications

Table 134. Micron Technology?US? Automotive MCU Functional Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 135. Micron Technology?US? Main Business

Table 136. Micron Technology?US? Latest Developments

Table 137. Samsung Electronics?KR? Basic Information, Automotive MCU Functional Chips Manufacturing Base, Sales Area and Its Competitors

Table 138. Samsung Electronics?KR? Automotive MCU Functional Chips Product Portfolios and Specifications

Table 139. Samsung Electronics?KR? Automotive MCU Functional Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 140. Samsung Electronics?KR? Main Business

Table 141. Samsung Electronics?KR? Latest Developments

Table 142. GigaDevice?CN? Basic Information, Automotive MCU Functional Chips Manufacturing Base, Sales Area and Its Competitors

Table 143. GigaDevice?CN? Automotive MCU Functional Chips Product Portfolios and Specifications

Table 144. GigaDevice?CN? Automotive MCU Functional Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 145. GigaDevice?CN? Main Business

Table 146. GigaDevice?CN? Latest Developments

Table 147. Beijing SiChip / Beijing Ingenic?CN? Basic Information, Automotive MCU Functional Chips Manufacturing Base, Sales Area and Its Competitors

Table 148. Beijing SiChip / Beijing Ingenic?CN? Automotive MCU Functional Chips Product Portfolios and Specifications

Table 149. Beijing SiChip / Beijing Ingenic?CN? Automotive MCU Functional Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 150. Beijing SiChip / Beijing Ingenic?CN? Main Business

Table 151. Beijing SiChip / Beijing Ingenic?CN? Latest Developments

Table 152. Analog Devices?US? Basic Information, Automotive MCU Functional Chips Manufacturing Base, Sales Area and Its Competitors

Table 153. Analog Devices?US? Automotive MCU Functional Chips Product Portfolios and Specifications

Table 154. Analog Devices?US? Automotive MCU Functional Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 155. Analog Devices?US? Main Business

Table 156. Analog Devices?US? Latest Developments

Table 157. Nanya Technology?TW? Basic Information, Automotive MCU Functional

Chips Manufacturing Base, Sales Area and Its Competitors

Table 158. Nanya Technology?TW? Automotive MCU Functional Chips Product Portfolios and Specifications

Table 159. Nanya Technology?TW? Automotive MCU Functional Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 160. Nanya Technology?TW? Main Business

Table 161. Nanya Technology?TW? Latest Developments

Table 162. SemiDrive Technology?CN? Basic Information, Automotive MCU Functional Chips Manufacturing Base, Sales Area and Its Competitors

Table 163. SemiDrive Technology?CN? Automotive MCU Functional Chips Product Portfolios and Specifications

Table 164. SemiDrive Technology?CN? Automotive MCU Functional Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 165. SemiDrive Technology?CN? Main Business

Table 166. SemiDrive Technology?CN? Latest Developments

Table 167. Horizon Robotics?CN? Basic Information, Automotive MCU Functional Chips Manufacturing Base, Sales Area and Its Competitors

Table 168. Horizon Robotics?CN? Automotive MCU Functional Chips Product Portfolios and Specifications

Table 169. Horizon Robotics?CN? Automotive MCU Functional Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 170. Horizon Robotics?CN? Main Business

Table 171. Horizon Robotics?CN? Latest Developments

Table 172. Star Semiconductor?CN? Basic Information, Automotive MCU Functional Chips Manufacturing Base, Sales Area and Its Competitors

Table 173. Star Semiconductor?CN? Automotive MCU Functional Chips Product Portfolios and Specifications

Table 174. Star Semiconductor?CN? Automotive MCU Functional Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 175. Star Semiconductor?CN? Main Business

Table 176. Star Semiconductor?CN? Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Automotive MCU Functional Chips
- Figure 2. Automotive MCU Functional Chips Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Automotive MCU Functional Chips Sales Growth Rate 2021-2032 (Million Units)
- Figure 7. Global Automotive MCU Functional Chips Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Automotive MCU Functional Chips Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Automotive MCU Functional Chips Sales Market Share by Country/Region (2025)
- Figure 10. Automotive MCU Functional Chips Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of 8-bit MCU
- Figure 12. Product Picture of 16-bit MCU
- Figure 13. Product Picture of 32-bit MCU
- Figure 14. Global Automotive MCU Functional Chips Sales Market Share by Type in 2026
- Figure 15. Global Automotive MCU Functional Chips Revenue Market Share by Type (2021-2026)
- Figure 16. Product Picture of Based on 8051 Architecture
- Figure 17. Product Picture of Based on ARM Architecture
- Figure 18. Product Picture of Based on RISC-V Architecture
- Figure 19. Global Automotive MCU Functional Chips Sales Market Share by Product Architecture in 2026
- Figure 20. Global Automotive MCU Functional Chips Revenue Market Share by Product Architecture (2021-2026)
- Figure 21. Product Picture of Powertrain Control
- Figure 22. Product Picture of Battery Management
- Figure 23. Product Picture of In-Vehicle Infotainment Systems
- Figure 24. Product Picture of Advanced Driver Assistance Systems (ADAS)
- Figure 25. Global Automotive MCU Functional Chips Sales Market Share by Function in 2026

Figure 26. Global Automotive MCU Functional Chips Revenue Market Share by Function (2021-2026)

Figure 27. Product Picture of Online Sales

Figure 28. Product Picture of Offline Sales

Figure 29. Global Automotive MCU Functional Chips Sales Market Share by Sales Channel in 2026

Figure 30. Global Automotive MCU Functional Chips Revenue Market Share by Sales Channel (2021-2026)

Figure 31. Automotive MCU Functional Chips Consumed in Passenger Vehicles

Figure 32. Global Automotive MCU Functional Chips Market: Passenger Vehicles (2021-2026) & (Million Units)

Figure 33. Automotive MCU Functional Chips Consumed in Commercial Vehicles

Figure 34. Global Automotive MCU Functional Chips Market: Commercial Vehicles (2021-2026) & (Million Units)

Figure 35. Global Automotive MCU Functional Chips Sale Market Share by Application (2025)

Figure 36. Global Automotive MCU Functional Chips Revenue Market Share by Application in 2025

Figure 37. Automotive MCU Functional Chips Sales by Company in 2025 (Million Units)

Figure 38. Global Automotive MCU Functional Chips Sales Market Share by Company in 2025

Figure 39. Automotive MCU Functional Chips Revenue by Company in 2025 (\$ millions)

Figure 40. Global Automotive MCU Functional Chips Revenue Market Share by Company in 2025

Figure 41. Global Automotive MCU Functional Chips Sales Market Share by Geographic Region (2021-2026)

Figure 42. Global Automotive MCU Functional Chips Revenue Market Share by Geographic Region in 2025

Figure 43. Americas Automotive MCU Functional Chips Sales 2021-2026 (Million Units)

Figure 44. Americas Automotive MCU Functional Chips Revenue 2021-2026 (\$ millions)

Figure 45. APAC Automotive MCU Functional Chips Sales 2021-2026 (Million Units)

Figure 46. APAC Automotive MCU Functional Chips Revenue 2021-2026 (\$ millions)

Figure 47. Europe Automotive MCU Functional Chips Sales 2021-2026 (Million Units)

Figure 48. Europe Automotive MCU Functional Chips Revenue 2021-2026 (\$ millions)

Figure 49. Middle East & Africa Automotive MCU Functional Chips Sales 2021-2026 (Million Units)

Figure 50. Middle East & Africa Automotive MCU Functional Chips Revenue 2021-2026 (\$ millions)

Figure 51. Americas Automotive MCU Functional Chips Sales Market Share by Country

in 2025

Figure 52. Americas Automotive MCU Functional Chips Revenue Market Share by Country (2021-2026)

Figure 53. Americas Automotive MCU Functional Chips Sales Market Share by Type (2021-2026)

Figure 54. Americas Automotive MCU Functional Chips Sales Market Share by Application (2021-2026)

Figure 55. United States Automotive MCU Functional Chips Revenue Growth 2021-2026 (\$ millions)

Figure 56. Canada Automotive MCU Functional Chips Revenue Growth 2021-2026 (\$ millions)

Figure 57. Mexico Automotive MCU Functional Chips Revenue Growth 2021-2026 (\$ millions)

Figure 58. Brazil Automotive MCU Functional Chips Revenue Growth 2021-2026 (\$ millions)

Figure 59. APAC Automotive MCU Functional Chips Sales Market Share by Region in 2025

Figure 60. APAC Automotive MCU Functional Chips Revenue Market Share by Region (2021-2026)

Figure 61. APAC Automotive MCU Functional Chips Sales Market Share by Type (2021-2026)

Figure 62. APAC Automotive MCU Functional Chips Sales Market Share by Application (2021-2026)

Figure 63. China Automotive MCU Functional Chips Revenue Growth 2021-2026 (\$ millions)

Figure 64. Japan Automotive MCU Functional Chips Revenue Growth 2021-2026 (\$ millions)

Figure 65. South Korea Automotive MCU Functional Chips Revenue Growth 2021-2026 (\$ millions)

Figure 66. Southeast Asia Automotive MCU Functional Chips Revenue Growth 2021-2026 (\$ millions)

Figure 67. India Automotive MCU Functional Chips Revenue Growth 2021-2026 (\$ millions)

Figure 68. Australia Automotive MCU Functional Chips Revenue Growth 2021-2026 (\$ millions)

Figure 69. China Taiwan Automotive MCU Functional Chips Revenue Growth 2021-2026 (\$ millions)

Figure 70. Europe Automotive MCU Functional Chips Sales Market Share by Country in 2025

Figure 71. Europe Automotive MCU Functional Chips Revenue Market Share by Country (2021-2026)

Figure 72. Europe Automotive MCU Functional Chips Sales Market Share by Type (2021-2026)

Figure 73. Europe Automotive MCU Functional Chips Sales Market Share by Application (2021-2026)

Figure 74. Germany Automotive MCU Functional Chips Revenue Growth 2021-2026 (\$ millions)

Figure 75. France Automotive MCU Functional Chips Revenue Growth 2021-2026 (\$ millions)

Figure 76. UK Automotive MCU Functional Chips Revenue Growth 2021-2026 (\$ millions)

Figure 77. Italy Automotive MCU Functional Chips Revenue Growth 2021-2026 (\$ millions)

Figure 78. Russia Automotive MCU Functional Chips Revenue Growth 2021-2026 (\$ millions)

Figure 79. Middle East & Africa Automotive MCU Functional Chips Sales Market Share by Country (2021-2026)

Figure 80. Middle East & Africa Automotive MCU Functional Chips Sales Market Share by Type (2021-2026)

Figure 81. Middle East & Africa Automotive MCU Functional Chips Sales Market Share by Application (2021-2026)

Figure 82. Egypt Automotive MCU Functional Chips Revenue Growth 2021-2026 (\$ millions)

Figure 83. South Africa Automotive MCU Functional Chips Revenue Growth 2021-2026 (\$ millions)

Figure 84. Israel Automotive MCU Functional Chips Revenue Growth 2021-2026 (\$ millions)

Figure 85. Turkey Automotive MCU Functional Chips Revenue Growth 2021-2026 (\$ millions)

Figure 86. GCC Countries Automotive MCU Functional Chips Revenue Growth 2021-2026 (\$ millions)

Figure 87. Manufacturing Cost Structure Analysis of Automotive MCU Functional Chips in 2026

Figure 88. Manufacturing Process Analysis of Automotive MCU Functional Chips

Figure 89. Industry Chain Structure of Automotive MCU Functional Chips

Figure 90. Channels of Distribution

Figure 91. Global Automotive MCU Functional Chips Sales Market Forecast by Region (2027-2032)

Figure 92. Global Automotive MCU Functional Chips Revenue Market Share Forecast by Region (2027-2032)

Figure 93. Global Automotive MCU Functional Chips Sales Market Share Forecast by Type (2027-2032)

Figure 94. Global Automotive MCU Functional Chips Revenue Market Share Forecast by Type (2027-2032)

Figure 95. Global Automotive MCU Functional Chips Sales Market Share Forecast by Application (2027-2032)

Figure 96. Global Automotive MCU Functional Chips Revenue Market Share Forecast by Application (2027-2032)

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