

# Global Battery Management Analog Front-End Chips Market Growth 2026-2032

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## Abstracts

The global Battery Management Analog Front-End Chips market size is predicted to grow from US\$ 1552 million in 2025 to US\$ 2922 million in 2032; it is expected to grow at a CAGR of 8.7% from 2026 to 2032.

The battery management AFE (Analog Front End) chip is essentially the data acquisition and monitoring chip in the BMS that is closest to the battery cells. Infineon defines it as a cell monitoring and balancing device, also known as a BMS IC or AFE; its core functions include measuring cell voltage and temperature, and working with the main controller to perform SoC/SoH estimation, balancing, thermal management triggering, fault alerts, and necessary disconnection protection.

In 2025, global sales of battery management analog front-end chips reached 187.51 million units, with an average price of \$8.46 per unit.

Moving from ?Basic Measurement? to ?High-Precision Measurement?

The competitive focus of AFEs is shifting from basic sampling to full-lifecycle accuracy, low drift, low noise, and redundant verification. This is particularly true for platform-type cells such as lithium iron phosphate (LFP), which have flatter discharge curves and are more sensitive to measurement errors in the millivolt range, thereby increasing the value of high-precision AFEs. ADI's relevant documentation explicitly states that high-precision AFEs are particularly well-suited for battery chemistries with relatively flat voltage platforms.

Moving from Discrete Solutions to High Integration

In low-to-medium voltage and industrial energy storage applications, AFEs are evolving toward highly integrated solutions that combine monitoring, balancing, protection, and communication interfaces to reduce BOM costs, simplify board layout, and shorten development cycles. Product documentation from Infineon and TI emphasizes that cell monitoring and balancing are no longer standalone measurement functions, but rather integrated solutions that work in conjunction with pack-level control, thermal management, and safety systems.

### The Importance of Functional Safety Continues to Rise

In automotive applications and an increasing number of industrial and energy storage scenarios, AFE selection is now clearly driven by functional safety frameworks such as ISO 26262 and IEC 61508. TI's white paper explicitly identifies redundant design, fault-tolerant communication, and the decomposition of safety objectives as key priorities for battery monitoring architectures; ISO has also positioned ISO 26262 as the functional safety framework for electrical and electronic systems in road vehicles.

### The Shift from Wired Daisy-Chaining to Wireless BMS

AFE themselves will not disappear, but the way systems are connected is changing. TI and other leading manufacturers are advancing wBMS (wireless battery management systems), with the goal of reducing wiring harnesses, lowering weight, optimizing assembly, and improving module reusability. In the medium term, wired daisy-chaining will remain the mainstream approach, but wireless BMS will continue to gain traction in high-end passenger vehicles and modular energy storage systems.

### Shift in Demand Focus from Standalone EVs to ?EVs + Energy Storage?

IEA data shows that global battery demand reached a historic milestone of approximately 1 TWh in 2024, with EV battery demand exceeding 950 GWh. Meanwhile, the IEA estimates that battery energy storage deployments will need to maintain an average annual growth rate of about 25% through 2030. This implies that demand for AFE is no longer driven solely by passenger vehicles but is simultaneously benefiting from expansion across multiple application scenarios, including power batteries, commercial and industrial energy storage, UPS/BBU, and data center backup power.

LP Information, Inc. (LPI) ' newest research report, the ?Battery Management Analog Front-End Chips Industry Forecast? looks at past sales and reviews total world Battery

Management Analog Front-End Chips sales in 2025, providing a comprehensive analysis by region and market sector of projected Battery Management Analog Front-End Chips sales for 2026 through 2032. With Battery Management Analog Front-End Chips sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Battery Management Analog Front-End Chips industry.

This Insight Report provides a comprehensive analysis of the global Battery Management Analog Front-End 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 Battery Management Analog Front-End Chips portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Battery Management Analog Front-End Chips market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Battery Management Analog Front-End 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 Battery Management Analog Front-End Chips.

This report presents a comprehensive overview, market shares, and growth opportunities of Battery Management Analog Front-End Chips market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Passive Equalization AFE

Active Equalization AFE

Segmentation by Number of Voltage Strings:

Low-voltage multi-string (6-16 strings)

Medium-voltage multi-string (14?24 strings)

High-voltage cascade type (?24 strings)

#### Segmentation by Sales Channels:

Direct Sales

Distribution

#### Segmentation by Application:

Power Batteries

Energy Storage

Industrial

Other

#### 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.

Analog Devices, Inc. (US)

Texas Instruments Incorporated (US)

NXP Semiconductors N.V. (NL)

Infineon Technologies AG (DE)

STMicroelectronics (EU)

Renesas Electronics Corporation (JP)

Monolithic Power Systems, Inc. (US)

Nuvoton Technology Corporation (TW)

ROHM Co., Ltd. (JP)

Nisshinbo Micro Devices Inc. (JP)

ABLIC Inc. (JP)

GigaDevice Semiconductor Inc. (CN)

SGMICRO Technology Co., Ltd. (CN)

CellWise Semiconductor Co., Ltd. (CN)

Silergy Corporation (TW)

Madeit Semiconductor Co., Ltd. (CN)

Holtek Semiconductor Inc. (TW)

Microchip Technology Inc. (US)

onsemi (US)

Toshiba Electronic Devices & Storage Corporation (JP)

## **Key Questions Addressed in this Report**

What is the 10-year outlook for the global Battery Management Analog Front-End Chips market?

What factors are driving Battery Management Analog Front-End Chips market growth, globally and by region?

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

How do Battery Management Analog Front-End Chips market opportunities vary by end market size?

How does Battery Management Analog Front-End 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 Battery Management Analog Front-End Chips Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Battery Management Analog Front-End Chips by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Battery Management Analog Front-End Chips by Country/Region, 2021, 2025 & 2032

#### 2.2 Battery Management Analog Front-End Chips Segment by Type

- 2.2.1 Passive Equalization AFE
- 2.2.2 Active Equalization AFE
- 2.2.3 Battery Management Analog Front-End Chips Sales by Type
  - 2.2.3.1 Global Battery Management Analog Front-End Chips Sales Market Share by Type (2021-2026)
  - 2.2.3.2 Global Battery Management Analog Front-End Chips Revenue and Market Share by Type (2021-2026)
  - 2.2.3.3 Global Battery Management Analog Front-End Chips Sale Price by Type (2021-2026)

#### 2.3 Battery Management Analog Front-End Chips Segment by Number of Voltage Strings

- 2.3.1 Low-voltage multi-string (6?16 strings)
- 2.3.2 Medium-voltage multi-string (14?24 strings)
- 2.3.3 High-voltage cascade type (?24 strings)
- 2.3.4 Battery Management Analog Front-End Chips Sales by Number of Voltage Strings
  - 2.3.4.1 Global Battery Management Analog Front-End Chips Sales Market Share by

## Number of Voltage Strings (2021-2026)

2.3.4.2 Global Battery Management Analog Front-End Chips Revenue and Market Share by Number of Voltage Strings (2021-2026)

2.3.4.3 Global Battery Management Analog Front-End Chips Sale Price by Number of Voltage Strings (2021-2026)

## 2.4 Battery Management Analog Front-End Chips Segment by Sales Channels

2.4.1 Direct Sales

2.4.2 Distribution

2.4.3 Battery Management Analog Front-End Chips Sales by Sales Channels

2.4.3.1 Global Battery Management Analog Front-End Chips Sales Market Share by Sales Channels (2021-2026)

2.4.3.2 Global Battery Management Analog Front-End Chips Revenue and Market Share by Sales Channels (2021-2026)

2.4.3.3 Global Battery Management Analog Front-End Chips Sale Price by Sales Channels (2021-2026)

## 2.5 Battery Management Analog Front-End Chips Segment by Application

2.5.1 Power Batteries

2.5.2 Energy Storage

2.5.3 Industrial

2.5.4 Other

2.5.5 Battery Management Analog Front-End Chips Sales by Application

2.5.5.1 Global Battery Management Analog Front-End Chips Sale Market Share by Application (2021-2026)

2.5.5.2 Global Battery Management Analog Front-End Chips Revenue and Market Share by Application (2021-2026)

2.5.5.3 Global Battery Management Analog Front-End Chips Sale Price by Application (2021-2026)

## **3 GLOBAL BY COMPANY**

### 3.1 Global Battery Management Analog Front-End Chips Breakdown Data by Company

3.1.1 Global Battery Management Analog Front-End Chips Annual Sales by Company (2021-2026)

3.1.2 Global Battery Management Analog Front-End Chips Sales Market Share by Company (2021-2026)

3.2 Global Battery Management Analog Front-End Chips Annual Revenue by Company (2021-2026)

3.2.1 Global Battery Management Analog Front-End Chips Revenue by Company (2021-2026)

3.2.2 Global Battery Management Analog Front-End Chips Revenue Market Share by Company (2021-2026)

3.3 Global Battery Management Analog Front-End Chips Sale Price by Company

3.4 Key Manufacturers Battery Management Analog Front-End Chips Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Battery Management Analog Front-End Chips Product Location Distribution

3.4.2 Players Battery Management Analog Front-End 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 BATTERY MANAGEMENT ANALOG FRONT-END CHIPS BY GEOGRAPHIC REGION**

4.1 World Historic Battery Management Analog Front-End Chips Market Size by Geographic Region (2021-2026)

4.1.1 Global Battery Management Analog Front-End Chips Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Battery Management Analog Front-End Chips Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Battery Management Analog Front-End Chips Market Size by Country/Region (2021-2026)

4.2.1 Global Battery Management Analog Front-End Chips Annual Sales by Country/Region (2021-2026)

4.2.2 Global Battery Management Analog Front-End Chips Annual Revenue by Country/Region (2021-2026)

4.3 Americas Battery Management Analog Front-End Chips Sales Growth

4.4 APAC Battery Management Analog Front-End Chips Sales Growth

4.5 Europe Battery Management Analog Front-End Chips Sales Growth

4.6 Middle East & Africa Battery Management Analog Front-End Chips Sales Growth

## **5 AMERICAS**

5.1 Americas Battery Management Analog Front-End Chips Sales by Country

5.1.1 Americas Battery Management Analog Front-End Chips Sales by Country (2021-2026)

5.1.2 Americas Battery Management Analog Front-End Chips Revenue by Country (2021-2026)

5.2 Americas Battery Management Analog Front-End Chips Sales by Type (2021-2026)

5.3 Americas Battery Management Analog Front-End Chips Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

## **6 APAC**

6.1 APAC Battery Management Analog Front-End Chips Sales by Region

6.1.1 APAC Battery Management Analog Front-End Chips Sales by Region (2021-2026)

6.1.2 APAC Battery Management Analog Front-End Chips Revenue by Region (2021-2026)

6.2 APAC Battery Management Analog Front-End Chips Sales by Type (2021-2026)

6.3 APAC Battery Management Analog Front-End 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 Battery Management Analog Front-End Chips by Country

7.1.1 Europe Battery Management Analog Front-End Chips Sales by Country (2021-2026)

7.1.2 Europe Battery Management Analog Front-End Chips Revenue by Country (2021-2026)

7.2 Europe Battery Management Analog Front-End Chips Sales by Type (2021-2026)

7.3 Europe Battery Management Analog Front-End 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 Battery Management Analog Front-End Chips by Country
  - 8.1.1 Middle East & Africa Battery Management Analog Front-End Chips Sales by Country (2021-2026)
  - 8.1.2 Middle East & Africa Battery Management Analog Front-End Chips Revenue by Country (2021-2026)
- 8.2 Middle East & Africa Battery Management Analog Front-End Chips Sales by Type (2021-2026)
- 8.3 Middle East & Africa Battery Management Analog Front-End 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 Battery Management Analog Front-End Chips
- 10.3 Manufacturing Process Analysis of Battery Management Analog Front-End Chips
- 10.4 Industry Chain Structure of Battery Management Analog Front-End Chips

## **11 MARKETING, DISTRIBUTORS AND CUSTOMER**

- 11.1 Sales Channel

- 11.1.1 Direct Channels
- 11.1.2 Indirect Channels
- 11.2 Battery Management Analog Front-End Chips Distributors
- 11.3 Battery Management Analog Front-End Chips Customer

## **12 WORLD FORECAST REVIEW FOR BATTERY MANAGEMENT ANALOG FRONT-END CHIPS BY GEOGRAPHIC REGION**

- 12.1 Global Battery Management Analog Front-End Chips Market Size Forecast by Region
  - 12.1.1 Global Battery Management Analog Front-End Chips Forecast by Region (2027-2032)
  - 12.1.2 Global Battery Management Analog Front-End 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 Battery Management Analog Front-End Chips Forecast by Type (2027-2032)
- 12.7 Global Battery Management Analog Front-End Chips Forecast by Application (2027-2032)

## **13 KEY PLAYERS ANALYSIS**

- 13.1 Analog Devices, Inc. (US)
  - 13.1.1 Analog Devices, Inc. (US) Company Information
  - 13.1.2 Analog Devices, Inc. (US) Battery Management Analog Front-End Chips Product Portfolios and Specifications
  - 13.1.3 Analog Devices, Inc. (US) Battery Management Analog Front-End Chips Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.1.4 Analog Devices, Inc. (US) Main Business Overview
  - 13.1.5 Analog Devices, Inc. (US) Latest Developments
- 13.2 Texas Instruments Incorporated (US)
  - 13.2.1 Texas Instruments Incorporated (US) Company Information
  - 13.2.2 Texas Instruments Incorporated (US) Battery Management Analog Front-End Chips Product Portfolios and Specifications
  - 13.2.3 Texas Instruments Incorporated (US) Battery Management Analog Front-End Chips Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.2.4 Texas Instruments Incorporated (US) Main Business Overview
- 13.2.5 Texas Instruments Incorporated (US) Latest Developments
- 13.3 NXP Semiconductors N.V. (NL)
  - 13.3.1 NXP Semiconductors N.V. (NL) Company Information
  - 13.3.2 NXP Semiconductors N.V. (NL) Battery Management Analog Front-End Chips Product Portfolios and Specifications
  - 13.3.3 NXP Semiconductors N.V. (NL) Battery Management Analog Front-End Chips Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.3.4 NXP Semiconductors N.V. (NL) Main Business Overview
  - 13.3.5 NXP Semiconductors N.V. (NL) Latest Developments
- 13.4 Infineon Technologies AG (DE)
  - 13.4.1 Infineon Technologies AG (DE) Company Information
  - 13.4.2 Infineon Technologies AG (DE) Battery Management Analog Front-End Chips Product Portfolios and Specifications
  - 13.4.3 Infineon Technologies AG (DE) Battery Management Analog Front-End Chips Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.4.4 Infineon Technologies AG (DE) Main Business Overview
  - 13.4.5 Infineon Technologies AG (DE) Latest Developments
- 13.5 STMicroelectronics (EU)
  - 13.5.1 STMicroelectronics (EU) Company Information
  - 13.5.2 STMicroelectronics (EU) Battery Management Analog Front-End Chips Product Portfolios and Specifications
  - 13.5.3 STMicroelectronics (EU) Battery Management Analog Front-End Chips Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.5.4 STMicroelectronics (EU) Main Business Overview
  - 13.5.5 STMicroelectronics (EU) Latest Developments
- 13.6 Renesas Electronics Corporation (JP)
  - 13.6.1 Renesas Electronics Corporation (JP) Company Information
  - 13.6.2 Renesas Electronics Corporation (JP) Battery Management Analog Front-End Chips Product Portfolios and Specifications
  - 13.6.3 Renesas Electronics Corporation (JP) Battery Management Analog Front-End Chips Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.6.4 Renesas Electronics Corporation (JP) Main Business Overview
  - 13.6.5 Renesas Electronics Corporation (JP) Latest Developments
- 13.7 Monolithic Power Systems, Inc. (US)
  - 13.7.1 Monolithic Power Systems, Inc. (US) Company Information
  - 13.7.2 Monolithic Power Systems, Inc. (US) Battery Management Analog Front-End Chips Product Portfolios and Specifications
  - 13.7.3 Monolithic Power Systems, Inc. (US) Battery Management Analog Front-End

## Chips Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 Monolithic Power Systems, Inc. (US) Main Business Overview

13.7.5 Monolithic Power Systems, Inc. (US) Latest Developments

## 13.8 Nuvoton Technology Corporation (TW)

13.8.1 Nuvoton Technology Corporation (TW) Company Information

13.8.2 Nuvoton Technology Corporation (TW) Battery Management Analog Front-End

## Chips Product Portfolios and Specifications

13.8.3 Nuvoton Technology Corporation (TW) Battery Management Analog Front-End

## Chips Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 Nuvoton Technology Corporation (TW) Main Business Overview

13.8.5 Nuvoton Technology Corporation (TW) Latest Developments

## 13.9 ROHM Co., Ltd. (JP)

13.9.1 ROHM Co., Ltd. (JP) Company Information

13.9.2 ROHM Co., Ltd. (JP) Battery Management Analog Front-End Chips Product

## Portfolios and Specifications

13.9.3 ROHM Co., Ltd. (JP) Battery Management Analog Front-End Chips Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 ROHM Co., Ltd. (JP) Main Business Overview

13.9.5 ROHM Co., Ltd. (JP) Latest Developments

## 13.10 Nisshinbo Micro Devices Inc. (JP)

13.10.1 Nisshinbo Micro Devices Inc. (JP) Company Information

13.10.2 Nisshinbo Micro Devices Inc. (JP) Battery Management Analog Front-End

## Chips Product Portfolios and Specifications

13.10.3 Nisshinbo Micro Devices Inc. (JP) Battery Management Analog Front-End

## Chips Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 Nisshinbo Micro Devices Inc. (JP) Main Business Overview

13.10.5 Nisshinbo Micro Devices Inc. (JP) Latest Developments

## 13.11 ABLIC Inc. (JP)

13.11.1 ABLIC Inc. (JP) Company Information

13.11.2 ABLIC Inc. (JP) Battery Management Analog Front-End Chips Product

## Portfolios and Specifications

13.11.3 ABLIC Inc. (JP) Battery Management Analog Front-End Chips Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 ABLIC Inc. (JP) Main Business Overview

13.11.5 ABLIC Inc. (JP) Latest Developments

## 13.12 GigaDevice Semiconductor Inc. (CN)

13.12.1 GigaDevice Semiconductor Inc. (CN) Company Information

13.12.2 GigaDevice Semiconductor Inc. (CN) Battery Management Analog Front-End

## Chips Product Portfolios and Specifications

- 13.12.3 GigaDevice Semiconductor Inc. (CN) Battery Management Analog Front-End Chips Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.12.4 GigaDevice Semiconductor Inc. (CN) Main Business Overview
- 13.12.5 GigaDevice Semiconductor Inc. (CN) Latest Developments
- 13.13 SGMICRO Technology Co., Ltd. (CN)
  - 13.13.1 SGMICRO Technology Co., Ltd. (CN) Company Information
  - 13.13.2 SGMICRO Technology Co., Ltd. (CN) Battery Management Analog Front-End Chips Product Portfolios and Specifications
  - 13.13.3 SGMICRO Technology Co., Ltd. (CN) Battery Management Analog Front-End Chips Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.13.4 SGMICRO Technology Co., Ltd. (CN) Main Business Overview
  - 13.13.5 SGMICRO Technology Co., Ltd. (CN) Latest Developments
- 13.14 CellWise Semiconductor Co., Ltd. (CN)
  - 13.14.1 CellWise Semiconductor Co., Ltd. (CN) Company Information
  - 13.14.2 CellWise Semiconductor Co., Ltd. (CN) Battery Management Analog Front-End Chips Product Portfolios and Specifications
  - 13.14.3 CellWise Semiconductor Co., Ltd. (CN) Battery Management Analog Front-End Chips Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.14.4 CellWise Semiconductor Co., Ltd. (CN) Main Business Overview
  - 13.14.5 CellWise Semiconductor Co., Ltd. (CN) Latest Developments
- 13.15 Silergy Corporation (TW)
  - 13.15.1 Silergy Corporation (TW) Company Information
  - 13.15.2 Silergy Corporation (TW) Battery Management Analog Front-End Chips Product Portfolios and Specifications
  - 13.15.3 Silergy Corporation (TW) Battery Management Analog Front-End Chips Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.15.4 Silergy Corporation (TW) Main Business Overview
  - 13.15.5 Silergy Corporation (TW) Latest Developments
- 13.16 Madeit Semiconductor Co., Ltd. (CN)
  - 13.16.1 Madeit Semiconductor Co., Ltd. (CN) Company Information
  - 13.16.2 Madeit Semiconductor Co., Ltd. (CN) Battery Management Analog Front-End Chips Product Portfolios and Specifications
  - 13.16.3 Madeit Semiconductor Co., Ltd. (CN) Battery Management Analog Front-End Chips Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.16.4 Madeit Semiconductor Co., Ltd. (CN) Main Business Overview
  - 13.16.5 Madeit Semiconductor Co., Ltd. (CN) Latest Developments
- 13.17 Holtek Semiconductor Inc. (TW)
  - 13.17.1 Holtek Semiconductor Inc. (TW) Company Information
  - 13.17.2 Holtek Semiconductor Inc. (TW) Battery Management Analog Front-End Chips

## Product Portfolios and Specifications

13.17.3 Holtek Semiconductor Inc. (TW) Battery Management Analog Front-End Chips Sales, Revenue, Price and Gross Margin (2021-2026)

13.17.4 Holtek Semiconductor Inc. (TW) Main Business Overview

13.17.5 Holtek Semiconductor Inc. (TW) Latest Developments

## 13.18 Microchip Technology Inc. (US)

13.18.1 Microchip Technology Inc. (US) Company Information

13.18.2 Microchip Technology Inc. (US) Battery Management Analog Front-End Chips Product Portfolios and Specifications

13.18.3 Microchip Technology Inc. (US) Battery Management Analog Front-End Chips Sales, Revenue, Price and Gross Margin (2021-2026)

13.18.4 Microchip Technology Inc. (US) Main Business Overview

13.18.5 Microchip Technology Inc. (US) Latest Developments

## 13.19 onsemi (US)

13.19.1 onsemi (US) Company Information

13.19.2 onsemi (US) Battery Management Analog Front-End Chips Product Portfolios and Specifications

13.19.3 onsemi (US) Battery Management Analog Front-End Chips Sales, Revenue, Price and Gross Margin (2021-2026)

13.19.4 onsemi (US) Main Business Overview

13.19.5 onsemi (US) Latest Developments

## 13.20 Toshiba Electronic Devices & Storage Corporation (JP)

13.20.1 Toshiba Electronic Devices & Storage Corporation (JP) Company Information

13.20.2 Toshiba Electronic Devices & Storage Corporation (JP) Battery Management Analog Front-End Chips Product Portfolios and Specifications

13.20.3 Toshiba Electronic Devices & Storage Corporation (JP) Battery Management Analog Front-End Chips Sales, Revenue, Price and Gross Margin (2021-2026)

13.20.4 Toshiba Electronic Devices & Storage Corporation (JP) Main Business Overview

13.20.5 Toshiba Electronic Devices & Storage Corporation (JP) Latest Developments

## **14 RESEARCH FINDINGS AND CONCLUSION**

## List Of Tables

### LIST OF TABLES

- Table 1. Battery Management Analog Front-End Chips Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Table 2. Battery Management Analog Front-End Chips Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of Passive Equalization AFE
- Table 4. Major Players of Active Equalization AFE
- Table 5. Global Battery Management Analog Front-End Chips Sales by Type (2021-2026) & (Million Pcs)
- Table 6. Global Battery Management Analog Front-End Chips Sales Market Share by Type (2021-2026)
- Table 7. Global Battery Management Analog Front-End Chips Revenue by Type (2021-2026) & (\$ million)
- Table 8. Global Battery Management Analog Front-End Chips Revenue Market Share by Type (2021-2026)
- Table 9. Global Battery Management Analog Front-End Chips Sale Price by Type (2021-2026) & (US\$/Pcs)
- Table 10. Major Players of Low-voltage multi-string (6?16 strings)
- Table 11. Major Players of Medium-voltage multi-string (14?24 strings)
- Table 12. Major Players of High-voltage cascade type (?24 strings)
- Table 13. Global Battery Management Analog Front-End Chips Sales by Number of Voltage Strings (2021-2026) & (Million Pcs)
- Table 14. Global Battery Management Analog Front-End Chips Sales Market Share by Number of Voltage Strings (2021-2026)
- Table 15. Global Battery Management Analog Front-End Chips Revenue by Number of Voltage Strings (2021-2026) & (\$ million)
- Table 16. Global Battery Management Analog Front-End Chips Revenue Market Share by Number of Voltage Strings (2021-2026)
- Table 17. Global Battery Management Analog Front-End Chips Sale Price by Number of Voltage Strings (2021-2026) & (US\$/Pcs)
- Table 18. Major Players of Direct Sales
- Table 19. Major Players of Distribution
- Table 20. Global Battery Management Analog Front-End Chips Sales by Sales Channels (2021-2026) & (Million Pcs)
- Table 21. Global Battery Management Analog Front-End Chips Sales Market Share by Sales Channels (2021-2026)

Table 22. Global Battery Management Analog Front-End Chips Revenue by Sales Channels (2021-2026) & (\$ million)

Table 23. Global Battery Management Analog Front-End Chips Revenue Market Share by Sales Channels (2021-2026)

Table 24. Global Battery Management Analog Front-End Chips Sale Price by Sales Channels (2021-2026) & (US\$/Pcs)

Table 25. Global Battery Management Analog Front-End Chips Sale by Application (2021-2026) & (Million Pcs)

Table 26. Global Battery Management Analog Front-End Chips Sale Market Share by Application (2021-2026)

Table 27. Global Battery Management Analog Front-End Chips Revenue by Application (2021-2026) & (\$ million)

Table 28. Global Battery Management Analog Front-End Chips Revenue Market Share by Application (2021-2026)

Table 29. Global Battery Management Analog Front-End Chips Sale Price by Application (2021-2026) & (US\$/Pcs)

Table 30. Global Battery Management Analog Front-End Chips Sales by Company (2021-2026) & (Million Pcs)

Table 31. Global Battery Management Analog Front-End Chips Sales Market Share by Company (2021-2026)

Table 32. Global Battery Management Analog Front-End Chips Revenue by Company (2021-2026) & (\$ millions)

Table 33. Global Battery Management Analog Front-End Chips Revenue Market Share by Company (2021-2026)

Table 34. Global Battery Management Analog Front-End Chips Sale Price by Company (2021-2026) & (US\$/Pcs)

Table 35. Key Manufacturers Battery Management Analog Front-End Chips Producing Area Distribution and Sales Area

Table 36. Players Battery Management Analog Front-End Chips Products Offered

Table 37. Battery Management Analog Front-End Chips Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 38. New Products and Potential Entrants

Table 39. Market M&A Activity & Strategy

Table 40. Global Battery Management Analog Front-End Chips Sales by Geographic Region (2021-2026) & (Million Pcs)

Table 41. Global Battery Management Analog Front-End Chips Sales Market Share Geographic Region (2021-2026)

Table 42. Global Battery Management Analog Front-End Chips Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 43. Global Battery Management Analog Front-End Chips Revenue Market Share by Geographic Region (2021-2026)

Table 44. Global Battery Management Analog Front-End Chips Sales by Country/Region (2021-2026) & (Million Pcs)

Table 45. Global Battery Management Analog Front-End Chips Sales Market Share by Country/Region (2021-2026)

Table 46. Global Battery Management Analog Front-End Chips Revenue by Country/Region (2021-2026) & (\$ millions)

Table 47. Global Battery Management Analog Front-End Chips Revenue Market Share by Country/Region (2021-2026)

Table 48. Americas Battery Management Analog Front-End Chips Sales by Country (2021-2026) & (Million Pcs)

Table 49. Americas Battery Management Analog Front-End Chips Sales Market Share by Country (2021-2026)

Table 50. Americas Battery Management Analog Front-End Chips Revenue by Country (2021-2026) & (\$ millions)

Table 51. Americas Battery Management Analog Front-End Chips Sales by Type (2021-2026) & (Million Pcs)

Table 52. Americas Battery Management Analog Front-End Chips Sales by Application (2021-2026) & (Million Pcs)

Table 53. APAC Battery Management Analog Front-End Chips Sales by Region (2021-2026) & (Million Pcs)

Table 54. APAC Battery Management Analog Front-End Chips Sales Market Share by Region (2021-2026)

Table 55. APAC Battery Management Analog Front-End Chips Revenue by Region (2021-2026) & (\$ millions)

Table 56. APAC Battery Management Analog Front-End Chips Sales by Type (2021-2026) & (Million Pcs)

Table 57. APAC Battery Management Analog Front-End Chips Sales by Application (2021-2026) & (Million Pcs)

Table 58. Europe Battery Management Analog Front-End Chips Sales by Country (2021-2026) & (Million Pcs)

Table 59. Europe Battery Management Analog Front-End Chips Revenue by Country (2021-2026) & (\$ millions)

Table 60. Europe Battery Management Analog Front-End Chips Sales by Type (2021-2026) & (Million Pcs)

Table 61. Europe Battery Management Analog Front-End Chips Sales by Application (2021-2026) & (Million Pcs)

Table 62. Middle East & Africa Battery Management Analog Front-End Chips Sales by

Country (2021-2026) & (Million Pcs)

Table 63. Middle East & Africa Battery Management Analog Front-End Chips Revenue Market Share by Country (2021-2026)

Table 64. Middle East & Africa Battery Management Analog Front-End Chips Sales by Type (2021-2026) & (Million Pcs)

Table 65. Middle East & Africa Battery Management Analog Front-End Chips Sales by Application (2021-2026) & (Million Pcs)

Table 66. Key Market Drivers & Growth Opportunities of Battery Management Analog Front-End Chips

Table 67. Key Market Challenges & Risks of Battery Management Analog Front-End Chips

Table 68. Key Industry Trends of Battery Management Analog Front-End Chips

Table 69. Battery Management Analog Front-End Chips Raw Material

Table 70. Key Suppliers of Raw Materials

Table 71. Battery Management Analog Front-End Chips Distributors List

Table 72. Battery Management Analog Front-End Chips Customer List

Table 73. Global Battery Management Analog Front-End Chips Sales Forecast by Region (2027-2032) & (Million Pcs)

Table 74. Global Battery Management Analog Front-End Chips Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 75. Americas Battery Management Analog Front-End Chips Sales Forecast by Country (2027-2032) & (Million Pcs)

Table 76. Americas Battery Management Analog Front-End Chips Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 77. APAC Battery Management Analog Front-End Chips Sales Forecast by Region (2027-2032) & (Million Pcs)

Table 78. APAC Battery Management Analog Front-End Chips Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 79. Europe Battery Management Analog Front-End Chips Sales Forecast by Country (2027-2032) & (Million Pcs)

Table 80. Europe Battery Management Analog Front-End Chips Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 81. Middle East & Africa Battery Management Analog Front-End Chips Sales Forecast by Country (2027-2032) & (Million Pcs)

Table 82. Middle East & Africa Battery Management Analog Front-End Chips Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 83. Global Battery Management Analog Front-End Chips Sales Forecast by Type (2027-2032) & (Million Pcs)

Table 84. Global Battery Management Analog Front-End Chips Revenue Forecast by

Type (2027-2032) & (\$ millions)

Table 85. Global Battery Management Analog Front-End Chips Sales Forecast by Application (2027-2032) & (Million Pcs)

Table 86. Global Battery Management Analog Front-End Chips Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 87. Analog Devices, Inc. (US) Basic Information, Battery Management Analog Front-End Chips Manufacturing Base, Sales Area and Its Competitors

Table 88. Analog Devices, Inc. (US) Battery Management Analog Front-End Chips Product Portfolios and Specifications

Table 89. Analog Devices, Inc. (US) Battery Management Analog Front-End Chips Sales (Million Pcs), Revenue (\$ Million), Price (US\$/Pcs) and Gross Margin (2021-2026)

Table 90. Analog Devices, Inc. (US) Main Business

Table 91. Analog Devices, Inc. (US) Latest Developments

Table 92. Texas Instruments Incorporated (US) Basic Information, Battery Management Analog Front-End Chips Manufacturing Base, Sales Area and Its Competitors

Table 93. Texas Instruments Incorporated (US) Battery Management Analog Front-End Chips Product Portfolios and Specifications

Table 94. Texas Instruments Incorporated (US) Battery Management Analog Front-End Chips Sales (Million Pcs), Revenue (\$ Million), Price (US\$/Pcs) and Gross Margin (2021-2026)

Table 95. Texas Instruments Incorporated (US) Main Business

Table 96. Texas Instruments Incorporated (US) Latest Developments

Table 97. NXP Semiconductors N.V. (NL) Basic Information, Battery Management Analog Front-End Chips Manufacturing Base, Sales Area and Its Competitors

Table 98. NXP Semiconductors N.V. (NL) Battery Management Analog Front-End Chips Product Portfolios and Specifications

Table 99. NXP Semiconductors N.V. (NL) Battery Management Analog Front-End Chips Sales (Million Pcs), Revenue (\$ Million), Price (US\$/Pcs) and Gross Margin (2021-2026)

Table 100. NXP Semiconductors N.V. (NL) Main Business

Table 101. NXP Semiconductors N.V. (NL) Latest Developments

Table 102. Infineon Technologies AG (DE) Basic Information, Battery Management Analog Front-End Chips Manufacturing Base, Sales Area and Its Competitors

Table 103. Infineon Technologies AG (DE) Battery Management Analog Front-End Chips Product Portfolios and Specifications

Table 104. Infineon Technologies AG (DE) Battery Management Analog Front-End Chips Sales (Million Pcs), Revenue (\$ Million), Price (US\$/Pcs) and Gross Margin (2021-2026)

Table 105. Infineon Technologies AG (DE) Main Business

Table 106. Infineon Technologies AG (DE) Latest Developments

Table 107. STMicroelectronics (EU) Basic Information, Battery Management Analog Front-End Chips Manufacturing Base, Sales Area and Its Competitors

Table 108. STMicroelectronics (EU) Battery Management Analog Front-End Chips Product Portfolios and Specifications

Table 109. STMicroelectronics (EU) Battery Management Analog Front-End Chips Sales (Million Pcs), Revenue (\$ Million), Price (US\$/Pcs) and Gross Margin (2021-2026)

Table 110. STMicroelectronics (EU) Main Business

Table 111. STMicroelectronics (EU) Latest Developments

Table 112. Renesas Electronics Corporation (JP) Basic Information, Battery Management Analog Front-End Chips Manufacturing Base, Sales Area and Its Competitors

Table 113. Renesas Electronics Corporation (JP) Battery Management Analog Front-End Chips Product Portfolios and Specifications

Table 114. Renesas Electronics Corporation (JP) Battery Management Analog Front-End Chips Sales (Million Pcs), Revenue (\$ Million), Price (US\$/Pcs) and Gross Margin (2021-2026)

Table 115. Renesas Electronics Corporation (JP) Main Business

Table 116. Renesas Electronics Corporation (JP) Latest Developments

Table 117. Monolithic Power Systems, Inc. (US) Basic Information, Battery Management Analog Front-End Chips Manufacturing Base, Sales Area and Its Competitors

Table 118. Monolithic Power Systems, Inc. (US) Battery Management Analog Front-End Chips Product Portfolios and Specifications

Table 119. Monolithic Power Systems, Inc. (US) Battery Management Analog Front-End Chips Sales (Million Pcs), Revenue (\$ Million), Price (US\$/Pcs) and Gross Margin (2021-2026)

Table 120. Monolithic Power Systems, Inc. (US) Main Business

Table 121. Monolithic Power Systems, Inc. (US) Latest Developments

Table 122. Nuvoton Technology Corporation (TW) Basic Information, Battery Management Analog Front-End Chips Manufacturing Base, Sales Area and Its Competitors

Table 123. Nuvoton Technology Corporation (TW) Battery Management Analog Front-End Chips Product Portfolios and Specifications

Table 124. Nuvoton Technology Corporation (TW) Battery Management Analog Front-End Chips Sales (Million Pcs), Revenue (\$ Million), Price (US\$/Pcs) and Gross Margin (2021-2026)

- Table 125. Nuvoton Technology Corporation (TW) Main Business
- Table 126. Nuvoton Technology Corporation (TW) Latest Developments
- Table 127. ROHM Co., Ltd. (JP) Basic Information, Battery Management Analog Front-End Chips Manufacturing Base, Sales Area and Its Competitors
- Table 128. ROHM Co., Ltd. (JP) Battery Management Analog Front-End Chips Product Portfolios and Specifications
- Table 129. ROHM Co., Ltd. (JP) Battery Management Analog Front-End Chips Sales (Million Pcs), Revenue (\$ Million), Price (US\$/Pcs) and Gross Margin (2021-2026)
- Table 130. ROHM Co., Ltd. (JP) Main Business
- Table 131. ROHM Co., Ltd. (JP) Latest Developments
- Table 132. Nisshinbo Micro Devices Inc. (JP) Basic Information, Battery Management Analog Front-End Chips Manufacturing Base, Sales Area and Its Competitors
- Table 133. Nisshinbo Micro Devices Inc. (JP) Battery Management Analog Front-End Chips Product Portfolios and Specifications
- Table 134. Nisshinbo Micro Devices Inc. (JP) Battery Management Analog Front-End Chips Sales (Million Pcs), Revenue (\$ Million), Price (US\$/Pcs) and Gross Margin (2021-2026)
- Table 135. Nisshinbo Micro Devices Inc. (JP) Main Business
- Table 136. Nisshinbo Micro Devices Inc. (JP) Latest Developments
- Table 137. ABLIC Inc. (JP) Basic Information, Battery Management Analog Front-End Chips Manufacturing Base, Sales Area and Its Competitors
- Table 138. ABLIC Inc. (JP) Battery Management Analog Front-End Chips Product Portfolios and Specifications
- Table 139. ABLIC Inc. (JP) Battery Management Analog Front-End Chips Sales (Million Pcs), Revenue (\$ Million), Price (US\$/Pcs) and Gross Margin (2021-2026)
- Table 140. ABLIC Inc. (JP) Main Business
- Table 141. ABLIC Inc. (JP) Latest Developments
- Table 142. GigaDevice Semiconductor Inc. (CN) Basic Information, Battery Management Analog Front-End Chips Manufacturing Base, Sales Area and Its Competitors
- Table 143. GigaDevice Semiconductor Inc. (CN) Battery Management Analog Front-End Chips Product Portfolios and Specifications
- Table 144. GigaDevice Semiconductor Inc. (CN) Battery Management Analog Front-End Chips Sales (Million Pcs), Revenue (\$ Million), Price (US\$/Pcs) and Gross Margin (2021-2026)
- Table 145. GigaDevice Semiconductor Inc. (CN) Main Business
- Table 146. GigaDevice Semiconductor Inc. (CN) Latest Developments
- Table 147. SGMICRO Technology Co., Ltd. (CN) Basic Information, Battery Management Analog Front-End Chips Manufacturing Base, Sales Area and Its

## Competitors

Table 148. SGMICRO Technology Co., Ltd. (CN) Battery Management Analog Front-End Chips Product Portfolios and Specifications

Table 149. SGMICRO Technology Co., Ltd. (CN) Battery Management Analog Front-End Chips Sales (Million Pcs), Revenue (\$ Million), Price (US\$/Pcs) and Gross Margin (2021-2026)

Table 150. SGMICRO Technology Co., Ltd. (CN) Main Business

Table 151. SGMICRO Technology Co., Ltd. (CN) Latest Developments

Table 152. CellWise Semiconductor Co., Ltd. (CN) Basic Information, Battery Management Analog Front-End Chips Manufacturing Base, Sales Area and Its Competitors

Table 153. CellWise Semiconductor Co., Ltd. (CN) Battery Management Analog Front-End Chips Product Portfolios and Specifications

Table 154. CellWise Semiconductor Co., Ltd. (CN) Battery Management Analog Front-End Chips Sales (Million Pcs), Revenue (\$ Million), Price (US\$/Pcs) and Gross Margin (2021-2026)

Table 155. CellWise Semiconductor Co., Ltd. (CN) Main Business

Table 156. CellWise Semiconductor Co., Ltd. (CN) Latest Developments

Table 157. Silergy Corporation (TW) Basic Information, Battery Management Analog Front-End Chips Manufacturing Base, Sales Area and Its Competitors

Table 158. Silergy Corporation (TW) Battery Management Analog Front-End Chips Product Portfolios and Specifications

Table 159. Silergy Corporation (TW) Battery Management Analog Front-End Chips Sales (Million Pcs), Revenue (\$ Million), Price (US\$/Pcs) and Gross Margin (2021-2026)

Table 160. Silergy Corporation (TW) Main Business

Table 161. Silergy Corporation (TW) Latest Developments

Table 162. Madeit Semiconductor Co., Ltd. (CN) Basic Information, Battery Management Analog Front-End Chips Manufacturing Base, Sales Area and Its Competitors

Table 163. Madeit Semiconductor Co., Ltd. (CN) Battery Management Analog Front-End Chips Product Portfolios and Specifications

Table 164. Madeit Semiconductor Co., Ltd. (CN) Battery Management Analog Front-End Chips Sales (Million Pcs), Revenue (\$ Million), Price (US\$/Pcs) and Gross Margin (2021-2026)

Table 165. Madeit Semiconductor Co., Ltd. (CN) Main Business

Table 166. Madeit Semiconductor Co., Ltd. (CN) Latest Developments

Table 167. Holtek Semiconductor Inc. (TW) Basic Information, Battery Management Analog Front-End Chips Manufacturing Base, Sales Area and Its Competitors

Table 168. Holtek Semiconductor Inc. (TW) Battery Management Analog Front-End Chips Product Portfolios and Specifications

Table 169. Holtek Semiconductor Inc. (TW) Battery Management Analog Front-End Chips Sales (Million Pcs), Revenue (\$ Million), Price (US\$/Pcs) and Gross Margin (2021-2026)

Table 170. Holtek Semiconductor Inc. (TW) Main Business

Table 171. Holtek Semiconductor Inc. (TW) Latest Developments

Table 172. Microchip Technology Inc. (US) Basic Information, Battery Management Analog Front-End Chips Manufacturing Base, Sales Area and Its Competitors

Table 173. Microchip Technology Inc. (US) Battery Management Analog Front-End Chips Product Portfolios and Specifications

Table 174. Microchip Technology Inc. (US) Battery Management Analog Front-End Chips Sales (Million Pcs), Revenue (\$ Million), Price (US\$/Pcs) and Gross Margin (2021-2026)

Table 175. Microchip Technology Inc. (US) Main Business

Table 176. Microchip Technology Inc. (US) Latest Developments

Table 177. onsemi (US) Basic Information, Battery Management Analog Front-End Chips Manufacturing Base, Sales Area and Its Competitors

Table 178. onsemi (US) Battery Management Analog Front-End Chips Product Portfolios and Specifications

Table 179. onsemi (US) Battery Management Analog Front-End Chips Sales (Million Pcs), Revenue (\$ Million), Price (US\$/Pcs) and Gross Margin (2021-2026)

Table 180. onsemi (US) Main Business

Table 181. onsemi (US) Latest Developments

Table 182. Toshiba Electronic Devices & Storage Corporation (JP) Basic Information, Battery Management Analog Front-End Chips Manufacturing Base, Sales Area and Its Competitors

Table 183. Toshiba Electronic Devices & Storage Corporation (JP) Battery Management Analog Front-End Chips Product Portfolios and Specifications

Table 184. Toshiba Electronic Devices & Storage Corporation (JP) Battery Management Analog Front-End Chips Sales (Million Pcs), Revenue (\$ Million), Price (US\$/Pcs) and Gross Margin (2021-2026)

Table 185. Toshiba Electronic Devices & Storage Corporation (JP) Main Business

Table 186. Toshiba Electronic Devices & Storage Corporation (JP) Latest Developments

## List Of Figures

### LIST OF FIGURES

- Figure 1. Picture of Battery Management Analog Front-End Chips
- Figure 2. Battery Management Analog Front-End Chips Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Battery Management Analog Front-End Chips Sales Growth Rate 2021-2032 (Million Pcs)
- Figure 7. Global Battery Management Analog Front-End Chips Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Battery Management Analog Front-End Chips Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Battery Management Analog Front-End Chips Sales Market Share by Country/Region (2025)
- Figure 10. Battery Management Analog Front-End Chips Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Passive Equalization AFE
- Figure 12. Product Picture of Active Equalization AFE
- Figure 13. Global Battery Management Analog Front-End Chips Sales Market Share by Type in 2026
- Figure 14. Global Battery Management Analog Front-End Chips Revenue Market Share by Type (2021-2026)
- Figure 15. Product Picture of Low-voltage multi-string (6?16 strings)
- Figure 16. Product Picture of Medium-voltage multi-string (14?24 strings)
- Figure 17. Product Picture of High-voltage cascade type (?24 strings)
- Figure 18. Global Battery Management Analog Front-End Chips Sales Market Share by Number of Voltage Strings in 2026
- Figure 19. Global Battery Management Analog Front-End Chips Revenue Market Share by Number of Voltage Strings (2021-2026)
- Figure 20. Product Picture of Direct Sales
- Figure 21. Product Picture of Distribution
- Figure 22. Global Battery Management Analog Front-End Chips Sales Market Share by Sales Channels in 2026
- Figure 23. Global Battery Management Analog Front-End Chips Revenue Market Share by Sales Channels (2021-2026)
- Figure 24. Battery Management Analog Front-End Chips Consumed in Power Batteries

Figure 25. Global Battery Management Analog Front-End Chips Market: Power Batteries (2021-2026) & (Million Pcs)

Figure 26. Battery Management Analog Front-End Chips Consumed in Energy Storage

Figure 27. Global Battery Management Analog Front-End Chips Market: Energy Storage (2021-2026) & (Million Pcs)

Figure 28. Battery Management Analog Front-End Chips Consumed in Industrial

Figure 29. Global Battery Management Analog Front-End Chips Market: Industrial (2021-2026) & (Million Pcs)

Figure 30. Battery Management Analog Front-End Chips Consumed in Other

Figure 31. Global Battery Management Analog Front-End Chips Market: Other (2021-2026) & (Million Pcs)

Figure 32. Global Battery Management Analog Front-End Chips Sale Market Share by Application (2025)

Figure 33. Global Battery Management Analog Front-End Chips Revenue Market Share by Application in 2025

Figure 34. Battery Management Analog Front-End Chips Sales by Company in 2025 (Million Pcs)

Figure 35. Global Battery Management Analog Front-End Chips Sales Market Share by Company in 2025

Figure 36. Battery Management Analog Front-End Chips Revenue by Company in 2025 (\$ millions)

Figure 37. Global Battery Management Analog Front-End Chips Revenue Market Share by Company in 2025

Figure 38. Global Battery Management Analog Front-End Chips Sales Market Share by Geographic Region (2021-2026)

Figure 39. Global Battery Management Analog Front-End Chips Revenue Market Share by Geographic Region in 2025

Figure 40. Americas Battery Management Analog Front-End Chips Sales 2021-2026 (Million Pcs)

Figure 41. Americas Battery Management Analog Front-End Chips Revenue 2021-2026 (\$ millions)

Figure 42. APAC Battery Management Analog Front-End Chips Sales 2021-2026 (Million Pcs)

Figure 43. APAC Battery Management Analog Front-End Chips Revenue 2021-2026 (\$ millions)

Figure 44. Europe Battery Management Analog Front-End Chips Sales 2021-2026 (Million Pcs)

Figure 45. Europe Battery Management Analog Front-End Chips Revenue 2021-2026 (\$ millions)

Figure 46. Middle East & Africa Battery Management Analog Front-End Chips Sales 2021-2026 (Million Pcs)

Figure 47. Middle East & Africa Battery Management Analog Front-End Chips Revenue 2021-2026 (\$ millions)

Figure 48. Americas Battery Management Analog Front-End Chips Sales Market Share by Country in 2025

Figure 49. Americas Battery Management Analog Front-End Chips Revenue Market Share by Country (2021-2026)

Figure 50. Americas Battery Management Analog Front-End Chips Sales Market Share by Type (2021-2026)

Figure 51. Americas Battery Management Analog Front-End Chips Sales Market Share by Application (2021-2026)

Figure 52. United States Battery Management Analog Front-End Chips Revenue Growth 2021-2026 (\$ millions)

Figure 53. Canada Battery Management Analog Front-End Chips Revenue Growth 2021-2026 (\$ millions)

Figure 54. Mexico Battery Management Analog Front-End Chips Revenue Growth 2021-2026 (\$ millions)

Figure 55. Brazil Battery Management Analog Front-End Chips Revenue Growth 2021-2026 (\$ millions)

Figure 56. APAC Battery Management Analog Front-End Chips Sales Market Share by Region in 2025

Figure 57. APAC Battery Management Analog Front-End Chips Revenue Market Share by Region (2021-2026)

Figure 58. APAC Battery Management Analog Front-End Chips Sales Market Share by Type (2021-2026)

Figure 59. APAC Battery Management Analog Front-End Chips Sales Market Share by Application (2021-2026)

Figure 60. China Battery Management Analog Front-End Chips Revenue Growth 2021-2026 (\$ millions)

Figure 61. Japan Battery Management Analog Front-End Chips Revenue Growth 2021-2026 (\$ millions)

Figure 62. South Korea Battery Management Analog Front-End Chips Revenue Growth 2021-2026 (\$ millions)

Figure 63. Southeast Asia Battery Management Analog Front-End Chips Revenue Growth 2021-2026 (\$ millions)

Figure 64. India Battery Management Analog Front-End Chips Revenue Growth 2021-2026 (\$ millions)

Figure 65. Australia Battery Management Analog Front-End Chips Revenue Growth

2021-2026 (\$ millions)

Figure 66. China Taiwan Battery Management Analog Front-End Chips Revenue

Growth 2021-2026 (\$ millions)

Figure 67. Europe Battery Management Analog Front-End Chips Sales Market Share by Country in 2025

Figure 68. Europe Battery Management Analog Front-End Chips Revenue Market Share by Country (2021-2026)

Figure 69. Europe Battery Management Analog Front-End Chips Sales Market Share by Type (2021-2026)

Figure 70. Europe Battery Management Analog Front-End Chips Sales Market Share by Application (2021-2026)

Figure 71. Germany Battery Management Analog Front-End Chips Revenue Growth 2021-2026 (\$ millions)

Figure 72. France Battery Management Analog Front-End Chips Revenue Growth 2021-2026 (\$ millions)

Figure 73. UK Battery Management Analog Front-End Chips Revenue Growth 2021-2026 (\$ millions)

Figure 74. Italy Battery Management Analog Front-End Chips Revenue Growth 2021-2026 (\$ millions)

Figure 75. Russia Battery Management Analog Front-End Chips Revenue Growth 2021-2026 (\$ millions)

Figure 76. Middle East & Africa Battery Management Analog Front-End Chips Sales Market Share by Country (2021-2026)

Figure 77. Middle East & Africa Battery Management Analog Front-End Chips Sales Market Share by Type (2021-2026)

Figure 78. Middle East & Africa Battery Management Analog Front-End Chips Sales Market Share by Application (2021-2026)

Figure 79. Egypt Battery Management Analog Front-End Chips Revenue Growth 2021-2026 (\$ millions)

Figure 80. South Africa Battery Management Analog Front-End Chips Revenue Growth 2021-2026 (\$ millions)

Figure 81. Israel Battery Management Analog Front-End Chips Revenue Growth 2021-2026 (\$ millions)

Figure 82. Turkey Battery Management Analog Front-End Chips Revenue Growth 2021-2026 (\$ millions)

Figure 83. GCC Countries Battery Management Analog Front-End Chips Revenue Growth 2021-2026 (\$ millions)

Figure 84. Manufacturing Cost Structure Analysis of Battery Management Analog Front-End Chips in 2026

Figure 85. Manufacturing Process Analysis of Battery Management Analog Front-End Chips

Figure 86. Industry Chain Structure of Battery Management Analog Front-End Chips

Figure 87. Channels of Distribution

Figure 88. Global Battery Management Analog Front-End Chips Sales Market Forecast by Region (2027-2032)

Figure 89. Global Battery Management Analog Front-End Chips Revenue Market Share Forecast by Region (2027-2032)

Figure 90. Global Battery Management Analog Front-End Chips Sales Market Share Forecast by Type (2027-2032)

Figure 91. Global Battery Management Analog Front-End Chips Revenue Market Share Forecast by Type (2027-2032)

Figure 92. Global Battery Management Analog Front-End Chips Sales Market Share Forecast by Application (2027-2032)

Figure 93. Global Battery Management Analog Front-End Chips Revenue Market Share Forecast by Application (2027-2032)

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