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Global Data-Center Power Monitoring IC Market Growth 2026-2032

https://marketpublishers.com/r/GF424008B213EN.html
Date: October 2026
Pages: 107
Price: US$ 3,660.00 (Single User License)
ID: GF424008B213EN

Abstracts

The global Data-Center Power Monitoring IC market size is predicted to grow from US$ 280 million in 2025 to US$ 707 million in 2032; it is expected to grow at a CAGR of 13.7% from 2026 to 2032.

Data-Center Power Monitoring IC refers to analog and mixed-signal integrated circuits designed to measure, calculate and digitally report electrical operating parameters across data-center power architectures. The market primarily covers standalone digital power monitor ICs, isolated power monitoring ICs, power-monitoring analog front ends, and protection or hot-swap controllers in which precision power monitoring is an identifiable core function. Typical devices measure shunt voltage, bus voltage and current through external shunt, integrated sensing or isolated sensing architectures, while higher-integration products further calculate instantaneous power, accumulated energy, temperature and programmable fault conditions. Key technical parameters include common-mode voltage capability, measurement accuracy, ADC resolution, channel count, bidirectional sensing capability and telemetry interface, with I?C, SMBus, PMBus, SPI and I3C forming the principal digital communication options. The research scope focuses on power monitoring functions deployed in server boards, AI/GPU accelerator systems, 48V/54V power distribution, power supplies, power shelves, intermediate bus converters, hot-swap backplanes, networking equipment and other data-center power nodes.

Key Findings

2025 global shipments are estimated at roughly 125–130 million units under the narrow product scope

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The estimated weighted average selling price in 2025 is approximately US$2.2–2.3 per unit

High-voltage digital monitoring and AI server power telemetry are becoming the most important structural growth directions

Market Trends

The Data-Center Power Monitoring IC market is moving from basic current measurement toward higher-voltage, higher-precision and more digitally integrated power telemetry. The transition of server architectures toward 48V/54V distribution is increasing demand for devices capable of operating at 60V, 80/85V and, in selected designs, up to 120V common-mode conditions while maintaining low-offset current measurement and wide dynamic range. Product functionality is also expanding from current and bus-voltage sensing toward direct power calculation, energy accumulation, temperature measurement, programmable alerts and bidirectional monitoring. At the interface level, I?C and SMBus remain mainstream, while PMBus is important for managed power systems and I3C is emerging in higher-speed telemetry designs. Integration is developing along two parallel routes: standalone high-precision monitors remain important for flexible board-level designs, while hot-swap, protection and monitoring functions are increasingly combined where system power density and fault-management requirements justify higher integration.

Market Dynamics

Drivers

The primary demand driver is the rapid increase in power density associated with AI accelerators, GPU servers and high-performance computing infrastructure. Higher system power raises the number and criticality of monitored power nodes and increases the value of accurate real-time telemetry for power budgeting, thermal management, reliability and preventive maintenance. The migration from conventional 12V architectures toward 48V/54V rack and board-level power distribution further supports demand for higher-voltage monitoring devices. At the same time, data-center operators and equipment designers are placing greater emphasis on measurable energy efficiency, fault visibility and power capping, which expands the role of power monitoring from a diagnostic component to part of the active system-management architecture.

Restraints

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Market expansion is moderated by increasing functional integration and persistent semiconductor price pressure. Multi-channel monitors can replace several single-channel devices, reducing IC count per monitored system even as the number of electrical measurement points increases. Power telemetry is also being integrated into selected power-management controllers, hot-swap devices and other mixed-function ICs, limiting standalone socket growth in some architectures. In addition, mature current- and power-monitor functions face pricing pressure as more analog semiconductor suppliers develop competitive alternatives. Qualification requirements in enterprise and hyperscale data-center platforms remain relatively stringent, which can extend design-in cycles and slow the commercial ramp of newly introduced devices despite technically competitive specifications.

Opportunities

The strongest opportunities are concentrated in high-voltage server power architectures, AI/GPU power rails and increasingly intelligent power-management nodes. Devices supporting 48V/54V systems with sufficient transient margin, wider common-mode ranges and higher measurement accuracy can capture additional semiconductor value as rack power density increases. Further opportunities exist in multi-channel monitoring, integrated power and energy accumulation, fast digital telemetry, power-monitor-plus-protection architectures and products designed for more sophisticated system diagnostics. Localized semiconductor supply is another structural opportunity, particularly in Asian server and electronics manufacturing ecosystems, where qualified domestic or regional suppliers can compete through faster engineering support, portfolio expansion and cost optimization while progressively moving into higher-voltage and higher-precision applications.

Challenges

The major long-term challenge is maintaining product differentiation as monitoring functions become increasingly standardized and integrated. Suppliers must simultaneously improve voltage tolerance, dynamic range, offset performance, conversion speed and digital functionality without materially increasing board area, power consumption or system cost. New server power architectures can also alter where monitoring functions are placed within the power chain, creating uncertainty regarding future standalone IC content per rack. Reliability qualification, calibration consistency and compatibility with system-management firmware remain important barriers for new entrants. Competitive pressure is therefore likely to intensify around technical performance and price at the same time, requiring suppliers to demonstrate both semiconductor-level accuracy and system-level integration capability.

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Industry Chain Analysis

The upstream portion of the Data-Center Power Monitoring IC industry comprises semiconductor process technologies, silicon wafers, analog and mixed-signal intellectual property, precision analog building blocks, packaging materials and semiconductor assembly and testing. Product performance depends heavily on precision current-sense front ends, low-offset amplifiers, high-resolution ADCs, voltage references, digital calculation engines and robust interface circuitry. Higher-voltage products place additional requirements on process selection, device isolation, package reliability and production calibration. Fabless suppliers generally rely more heavily on external wafer foundries and outsourced assembly and test, while integrated device manufacturers retain a greater proportion of manufacturing internally, although hybrid manufacturing models are common.

The midstream value-creation process includes IC architecture design, analog calibration, digital telemetry integration, functional safety and protection design, packaging, production testing and application-level validation. Downstream deployment occurs through server motherboards, accelerator boards, power supplies, power shelves, intermediate bus converters, network and storage equipment and rack-level power systems. Semiconductor value is not determined solely by die cost: precision, high-voltage capability, calibration, accumulated design know-how, firmware compatibility and platform qualification contribute materially to product value. As monitoring functions become more closely linked with system power management, application engineering and long-term customer qualification become increasingly important competitive assets.

Segment Insights

By product type, standalone digital power monitor ICs continue to represent the broadest established product architecture because they offer flexible placement across server boards, power rails and intermediate power nodes. Integrated hot-swap or protection devices with digital power monitoring form a higher-value segment where fault management and telemetry must be combined, while isolated monitoring devices occupy more specialized positions in power supply and electrically isolated measurement applications. Power-monitoring AFEs remain relevant where system processors perform part of the calculation or telemetry function externally.

By voltage rating, the >36–60V category is becoming increasingly important as 48V/54V distribution penetrates higher-power server systems, while >60V products

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are gaining strategic relevance because designers require additional voltage headroom for transients, protection and emerging high-power architectures. By channel count, single-channel devices retain broad applicability, but dual-channel and three-to-four-channel monitors offer stronger board-space and system-cost advantages in multi-rail designs. The fastest product innovation is therefore concentrated around the intersection of higher bus voltage, higher precision, digital power calculation and greater integration rather than around basic current sensing alone.

Downstream Market Opportunities

Cloud and hyperscale data centers represent the largest established commercial application base for Data-Center Power Monitoring ICs, while AI and high-performance computing infrastructure provides the strongest incremental opportunity because of significantly higher accelerator power, denser power conversion and more demanding telemetry requirements. Enterprise and colocation data centers provide a broader but generally less power-intensive installed base, supporting continued demand for reliability monitoring and energy management. Telecom and edge data centers add opportunities where compact form factors, high system availability and remote diagnostic capabilities are important. Across these markets, the most attractive semiconductor content growth is associated with systems in which power monitoring becomes part of active power budgeting, fault protection and operational optimization rather than a passive measurement function.

Regional Insights

North America is assessed as the largest regional demand center for Data-Center Power Monitoring ICs, supported by the concentration of hyperscale cloud infrastructure, AI computing investment and leading server-platform development. It is also the most concentrated supply-side region, with several established analog and mixed-signal semiconductor companies maintaining broad power-monitoring portfolios and long-standing platform qualifications. The region therefore remains particularly important for high-performance products, advanced server architectures and premium monitoring applications.

Asia-Pacific is the most dynamic region in terms of supply-chain expansion and competitive broadening. Mainland China and Taiwan have increasingly visible power-monitoring IC portfolios linked to server, networking and electronics manufacturing ecosystems, while Japan retains established analog semiconductor capabilities. Localization, faster product iteration and competitive pricing are supporting the

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expansion of regional suppliers, particularly in 48V-compatible and high-voltage monitoring devices. Europe maintains a smaller demand base but remains technically relevant through high-performance analog semiconductor development and data-center power innovation.

Competitive Landscape Analysis

The competitive landscape of Data-Center Power Monitoring ICs is relatively concentrated because the narrow market requires a combination of precision analog expertise, high-voltage design capability, digital telemetry integration and platform-level qualification. The confirmed Core Formal List contains 11 parent-level suppliers. Established global analog semiconductor companies retain advantages in portfolio breadth, installed design base, reliability records and engineering ecosystems, while newer and regional suppliers are expanding through higher-voltage products, competitive pricing and faster portfolio development. Competition differs by architecture: standalone digital monitors emphasize measurement accuracy, voltage range, interface capability and channel count; integrated hot-swap and protection solutions compete through system-level functionality and fault-management performance; isolated devices rely on sensing architecture and high-voltage robustness. The market is therefore unlikely to be determined by price alone. Long-term competitive positioning will increasingly depend on the ability to support 48V/54V and higher-power platforms, maintain accuracy across wide operating ranges, integrate digital telemetry and protection functions, and secure repeat design wins in server and data-center power systems.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Data-Center Power Monitoring IC 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

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Data-Center Power Monitoring IC portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Data-Center Power Monitoring IC market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Data-Center Power Monitoring IC 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 Data-Center Power Monitoring IC.

This report presents a comprehensive overview, market shares, and growth opportunities of Data-Center Power Monitoring IC market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Standalone Digital Power Monitor IC

Hot-Swap / Protection IC with Power Monitoring

Other

Segmentation by Bus Voltage Rating:

?36 V

>36–60 V

>60–100 V

>100 V

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Segmentation by Number of Monitoring Channels:

1 Channel

2 Channels

3–4 Channels

?5 Channels

Segmentation by Current Sensing Technology:

External Shunt Sensing

Magnetic / Hall Sensing

Isolated Sensing

Other

Segmentation by Application:

Cloud & Hyperscale Data Centers

AI & High-Performance Computing Data Centers

Telecom & Edge Data Centers

Government & Research Data Centers

Other

This report also splits the market by region:

Americas

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United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

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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.

MediaTek Inc.

Texas Instruments Incorporated

STMicroelectronics N.V.

Analog Devices, Inc.

Renesas Electronics Corporation

ON Semiconductor Corporation

Microchip Technology Incorporated

Monolithic Power Systems, Inc.

Allegro MicroSystems, Inc.

SG Micro Corp

3PEAK INCORPORATED

Key Questions Addressed in this Report

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What is the 10-year outlook for the global Data-Center Power Monitoring IC market?

What factors are driving Data-Center Power Monitoring IC market growth, globally and by region?

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

How do Data-Center Power Monitoring IC market opportunities vary by end market size?

How does Data-Center Power Monitoring IC break out by Type, by Application?

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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 Data-Center Power Monitoring IC Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for Data-Center Power Monitoring IC by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for Data-Center Power Monitoring IC by Country/Region, 2021, 2025 & 2032
2.2 Data-Center Power Monitoring IC Segment by Type
  2.2.1 Standalone Digital Power Monitor IC
  2.2.2 Hot-Swap / Protection IC with Power Monitoring
  2.2.3 Other
  2.2.4 Data-Center Power Monitoring IC Sales by Type
    2.2.4.1 Global Data-Center Power Monitoring IC Sales Market Share by Type (2021-2026)
    2.2.4.2 Global Data-Center Power Monitoring IC Revenue and Market Share by Type (2021-2026)
    2.2.4.3 Global Data-Center Power Monitoring IC Sale Price by Type (2021-2026)
2.3 Data-Center Power Monitoring IC Segment by Bus Voltage Rating
  2.3.1 ?36 V
  2.3.2 >36–60 V
  2.3.3 >60–100 V
  2.3.4 >100 V
  2.3.5 Data-Center Power Monitoring IC Sales by Bus Voltage Rating
    2.3.5.1 Global Data-Center Power Monitoring IC Sales Market Share by Bus Voltage Rating (2021-2026)

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2.3.5.2 Global Data-Center Power Monitoring IC Revenue and Market Share by Bus Voltage Rating (2021-2026)
2.3.5.3 Global Data-Center Power Monitoring IC Sale Price by Bus Voltage Rating (2021-2026)
2.4 Data-Center Power Monitoring IC Segment by Number of Monitoring Channels
2.4.1 1 Channel
2.4.2 2 Channels
2.4.3 3–4 Channels
2.4.4 ?5 Channels
2.4.5 Data-Center Power Monitoring IC Sales by Number of Monitoring Channels
2.4.5.1 Global Data-Center Power Monitoring IC Sales Market Share by Number of Monitoring Channels (2021-2026)
2.4.5.2 Global Data-Center Power Monitoring IC Revenue and Market Share by Number of Monitoring Channels (2021-2026)
2.4.5.3 Global Data-Center Power Monitoring IC Sale Price by Number of Monitoring Channels (2021-2026)
2.5 Data-Center Power Monitoring IC Segment by Current Sensing Technology
2.5.1 External Shunt Sensing
2.5.2 Magnetic / Hall Sensing
2.5.3 Isolated Sensing
2.5.4 Other
2.5.5 Data-Center Power Monitoring IC Sales by Current Sensing Technology
2.5.5.1 Global Data-Center Power Monitoring IC Sales Market Share by Current Sensing Technology (2021-2026)
2.5.5.2 Global Data-Center Power Monitoring IC Revenue and Market Share by Current Sensing Technology (2021-2026)
2.5.5.3 Global Data-Center Power Monitoring IC Sale Price by Current Sensing Technology (2021-2026)
2.6 Data-Center Power Monitoring IC Segment by Application
2.6.1 Cloud & Hyperscale Data Centers
2.6.2 AI & High-Performance Computing Data Centers
2.6.3 Telecom & Edge Data Centers
2.6.4 Government & Research Data Centers
2.6.5 Other
2.6.6 Data-Center Power Monitoring IC Sales by Application
2.6.6.1 Global Data-Center Power Monitoring IC Sale Market Share by Application (2021-2026)
2.6.6.2 Global Data-Center Power Monitoring IC Revenue and Market Share by Application (2021-2026)

+357 96 030922
info@marketpublishers.com

2.6.6.3 Global Data-Center Power Monitoring IC Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Data-Center Power Monitoring IC Breakdown Data by Company
3.1.1 Global Data-Center Power Monitoring IC Annual Sales by Company (2021-2026)
3.1.2 Global Data-Center Power Monitoring IC Sales Market Share by Company (2021-2026)
3.2 Global Data-Center Power Monitoring IC Annual Revenue by Company (2021-2026)
3.2.1 Global Data-Center Power Monitoring IC Revenue by Company (2021-2026)
3.2.2 Global Data-Center Power Monitoring IC Revenue Market Share by Company (2021-2026)
3.3 Global Data-Center Power Monitoring IC Sale Price by Company
3.4 Key Manufacturers Data-Center Power Monitoring IC Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers Data-Center Power Monitoring IC Product Location Distribution
3.4.2 Players Data-Center Power Monitoring IC 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 DATA-CENTER POWER MONITORING IC BY GEOGRAPHIC REGION

4.1 World Historic Data-Center Power Monitoring IC Market Size by Geographic Region (2021-2026)
4.1.1 Global Data-Center Power Monitoring IC Annual Sales by Geographic Region (2021-2026)
4.1.2 Global Data-Center Power Monitoring IC Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic Data-Center Power Monitoring IC Market Size by Country/Region (2021-2026)
4.2.1 Global Data-Center Power Monitoring IC Annual Sales by Country/Region (2021-2026)
4.2.2 Global Data-Center Power Monitoring IC Annual Revenue by Country/Region

+357 96 030922
info@marketpublishers.com

(2021-2026)
4.3 Americas Data-Center Power Monitoring IC Sales Growth
4.4 APAC Data-Center Power Monitoring IC Sales Growth
4.5 Europe Data-Center Power Monitoring IC Sales Growth
4.6 Middle East & Africa Data-Center Power Monitoring IC Sales Growth

5 AMERICAS

5.1 Americas Data-Center Power Monitoring IC Sales by Country
  5.1.1 Americas Data-Center Power Monitoring IC Sales by Country (2021-2026)
  5.1.2 Americas Data-Center Power Monitoring IC Revenue by Country (2021-2026)
5.2 Americas Data-Center Power Monitoring IC Sales by Type (2021-2026)
5.3 Americas Data-Center Power Monitoring IC Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC Data-Center Power Monitoring IC Sales by Region
  6.1.1 APAC Data-Center Power Monitoring IC Sales by Region (2021-2026)
  6.1.2 APAC Data-Center Power Monitoring IC Revenue by Region (2021-2026)
6.2 APAC Data-Center Power Monitoring IC Sales by Type (2021-2026)
6.3 APAC Data-Center Power Monitoring IC 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 Data-Center Power Monitoring IC by Country
  7.1.1 Europe Data-Center Power Monitoring IC Sales by Country (2021-2026)
  7.1.2 Europe Data-Center Power Monitoring IC Revenue by Country (2021-2026)
7.2 Europe Data-Center Power Monitoring IC Sales by Type (2021-2026)

+357 96 030922
info@marketpublishers.com

7.3 Europe Data-Center Power Monitoring IC 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 Data-Center Power Monitoring IC by Country
  8.1.1 Middle East & Africa Data-Center Power Monitoring IC Sales by Country (2021-2026)
  8.1.2 Middle East & Africa Data-Center Power Monitoring IC Revenue by Country (2021-2026)
8.2 Middle East & Africa Data-Center Power Monitoring IC Sales by Type (2021-2026)
8.3 Middle East & Africa Data-Center Power Monitoring IC 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 Data-Center Power Monitoring IC
10.3 Manufacturing Process Analysis of Data-Center Power Monitoring IC
10.4 Industry Chain Structure of Data-Center Power Monitoring IC

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

+357 96 030922
info@marketpublishers.com

11.1.1 Direct Channels
11.1.2 Indirect Channels
11.2 Data-Center Power Monitoring IC Distributors
11.3 Data-Center Power Monitoring IC Customer

12 WORLD FORECAST REVIEW FOR DATA-CENTER POWER MONITORING IC BY GEOGRAPHIC REGION

12.1 Global Data-Center Power Monitoring IC Market Size Forecast by Region
12.1.1 Global Data-Center Power Monitoring IC Forecast by Region (2027-2032)
12.1.2 Global Data-Center Power Monitoring IC 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 Data-Center Power Monitoring IC Forecast by Type (2027-2032)
12.7 Global Data-Center Power Monitoring IC Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 MediaTek Inc.
13.1.1 MediaTek Inc. Company Information
13.1.2 MediaTek Inc. Data-Center Power Monitoring IC Product Portfolios and Specifications
13.1.3 MediaTek Inc. Data-Center Power Monitoring IC Sales, Revenue, Price and Gross Margin (2021-2026)
13.1.4 MediaTek Inc. Main Business Overview
13.1.5 MediaTek Inc. Latest Developments
13.2 Texas Instruments Incorporated
13.2.1 Texas Instruments Incorporated Company Information
13.2.2 Texas Instruments Incorporated Data-Center Power Monitoring IC Product Portfolios and Specifications
13.2.3 Texas Instruments Incorporated Data-Center Power Monitoring IC Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 Texas Instruments Incorporated Main Business Overview
13.2.5 Texas Instruments Incorporated Latest Developments
13.3 STMicroelectronics N.V.
13.3.1 STMicroelectronics N.V. Company Information

+357 96 030922
info@marketpublishers.com

13.3.2 STMicroelectronics N.V. Data-Center Power Monitoring IC Product Portfolios and Specifications
13.3.3 STMicroelectronics N.V. Data-Center Power Monitoring IC Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 STMicroelectronics N.V. Main Business Overview
13.3.5 STMicroelectronics N.V. Latest Developments
13.4 Analog Devices, Inc.
13.4.1 Analog Devices, Inc. Company Information
13.4.2 Analog Devices, Inc. Data-Center Power Monitoring IC Product Portfolios and Specifications
13.4.3 Analog Devices, Inc. Data-Center Power Monitoring IC Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 Analog Devices, Inc. Main Business Overview
13.4.5 Analog Devices, Inc. Latest Developments
13.5 Renesas Electronics Corporation
13.5.1 Renesas Electronics Corporation Company Information
13.5.2 Renesas Electronics Corporation Data-Center Power Monitoring IC Product Portfolios and Specifications
13.5.3 Renesas Electronics Corporation Data-Center Power Monitoring IC Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 Renesas Electronics Corporation Main Business Overview
13.5.5 Renesas Electronics Corporation Latest Developments
13.6 ON Semiconductor Corporation
13.6.1 ON Semiconductor Corporation Company Information
13.6.2 ON Semiconductor Corporation Data-Center Power Monitoring IC Product Portfolios and Specifications
13.6.3 ON Semiconductor Corporation Data-Center Power Monitoring IC Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 ON Semiconductor Corporation Main Business Overview
13.6.5 ON Semiconductor Corporation Latest Developments
13.7 Microchip Technology Incorporated
13.7.1 Microchip Technology Incorporated Company Information
13.7.2 Microchip Technology Incorporated Data-Center Power Monitoring IC Product Portfolios and Specifications
13.7.3 Microchip Technology Incorporated Data-Center Power Monitoring IC Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 Microchip Technology Incorporated Main Business Overview
13.7.5 Microchip Technology Incorporated Latest Developments
13.8 Monolithic Power Systems, Inc.

+357 96 030922
info@marketpublishers.com

13.8.1 Monolithic Power Systems, Inc. Company Information
13.8.2 Monolithic Power Systems, Inc. Data-Center Power Monitoring IC Product Portfolios and Specifications
13.8.3 Monolithic Power Systems, Inc. Data-Center Power Monitoring IC Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 Monolithic Power Systems, Inc. Main Business Overview
13.8.5 Monolithic Power Systems, Inc. Latest Developments
13.9 Allegro MicroSystems, Inc.
13.9.1 Allegro MicroSystems, Inc. Company Information
13.9.2 Allegro MicroSystems, Inc. Data-Center Power Monitoring IC Product Portfolios and Specifications
13.9.3 Allegro MicroSystems, Inc. Data-Center Power Monitoring IC Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 Allegro MicroSystems, Inc. Main Business Overview
13.9.5 Allegro MicroSystems, Inc. Latest Developments
13.10 SG Micro Corp
13.10.1 SG Micro Corp Company Information
13.10.2 SG Micro Corp Data-Center Power Monitoring IC Product Portfolios and Specifications
13.10.3 SG Micro Corp Data-Center Power Monitoring IC Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 SG Micro Corp Main Business Overview
13.10.5 SG Micro Corp Latest Developments
13.11 3PEAK INCORPORATED
13.11.1 3PEAK INCORPORATED Company Information
13.11.2 3PEAK INCORPORATED Data-Center Power Monitoring IC Product Portfolios and Specifications
13.11.3 3PEAK INCORPORATED Data-Center Power Monitoring IC Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 3PEAK INCORPORATED Main Business Overview
13.11.5 3PEAK INCORPORATED Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

+357 96 030922
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List Of Tables

LIST OF TABLES

Table 1. Data-Center Power Monitoring IC Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. Data-Center Power Monitoring IC Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of Standalone Digital Power Monitor IC
Table 4. Major Players of Hot-Swap / Protection IC with Power Monitoring
Table 5. Major Players of Other
Table 6. Global Data-Center Power Monitoring IC Sales by Type (2021-2026) & (Million Units)
Table 7. Global Data-Center Power Monitoring IC Sales Market Share by Type (2021-2026)
Table 8. Global Data-Center Power Monitoring IC Revenue by Type (2021-2026) & ($ million)
Table 9. Global Data-Center Power Monitoring IC Revenue Market Share by Type (2021-2026)
Table 10. Global Data-Center Power Monitoring IC Sale Price by Type (2021-2026) & (US$/Unit)
Table 11. Major Players of ?36 V
Table 12. Major Players of >36–60 V
Table 13. Major Players of >60–100 V
Table 14. Major Players of >100 V
Table 15. Global Data-Center Power Monitoring IC Sales by Bus Voltage Rating (2021-2026) & (Million Units)
Table 16. Global Data-Center Power Monitoring IC Sales Market Share by Bus Voltage Rating (2021-2026)
Table 17. Global Data-Center Power Monitoring IC Revenue by Bus Voltage Rating (2021-2026) & ($ million)
Table 18. Global Data-Center Power Monitoring IC Revenue Market Share by Bus Voltage Rating (2021-2026)
Table 19. Global Data-Center Power Monitoring IC Sale Price by Bus Voltage Rating (2021-2026) & (US$/Unit)
Table 20. Major Players of 1 Channel
Table 21. Major Players of 2 Channels
Table 22. Major Players of 3–4 Channels
Table 23. Major Players of ?5 Channels

+357 96 030922
info@marketpublishers.com

Table 24. Global Data-Center Power Monitoring IC Sales by Number of Monitoring Channels (2021-2026) & (Million Units)
Table 25. Global Data-Center Power Monitoring IC Sales Market Share by Number of Monitoring Channels (2021-2026)
Table 26. Global Data-Center Power Monitoring IC Revenue by Number of Monitoring Channels (2021-2026) & ($ million)
Table 27. Global Data-Center Power Monitoring IC Revenue Market Share by Number of Monitoring Channels (2021-2026)
Table 28. Global Data-Center Power Monitoring IC Sale Price by Number of Monitoring Channels (2021-2026) & (US$/Unit)
Table 29. Major Players of External Shunt Sensing
Table 30. Major Players of Magnetic / Hall Sensing
Table 31. Major Players of Isolated Sensing
Table 32. Major Players of Other
Table 33. Global Data-Center Power Monitoring IC Sales by Current Sensing Technology (2021-2026) & (Million Units)
Table 34. Global Data-Center Power Monitoring IC Sales Market Share by Current Sensing Technology (2021-2026)
Table 35. Global Data-Center Power Monitoring IC Revenue by Current Sensing Technology (2021-2026) & ($ million)
Table 36. Global Data-Center Power Monitoring IC Revenue Market Share by Current Sensing Technology (2021-2026)
Table 37. Global Data-Center Power Monitoring IC Sale Price by Current Sensing Technology (2021-2026) & (US$/Unit)
Table 38. Global Data-Center Power Monitoring IC Sale by Application (2021-2026) & (Million Units)
Table 39. Global Data-Center Power Monitoring IC Sale Market Share by Application (2021-2026)
Table 40. Global Data-Center Power Monitoring IC Revenue by Application (2021-2026) & ($ million)
Table 41. Global Data-Center Power Monitoring IC Revenue Market Share by Application (2021-2026)
Table 42. Global Data-Center Power Monitoring IC Sale Price by Application (2021-2026) & (US$/Unit)
Table 43. Global Data-Center Power Monitoring IC Sales by Company (2021-2026) & (Million Units)
Table 44. Global Data-Center Power Monitoring IC Sales Market Share by Company (2021-2026)
Table 45. Global Data-Center Power Monitoring IC Revenue by Company (2021-2026)

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& ($ millions)
Table 46. Global Data-Center Power Monitoring IC Revenue Market Share by Company (2021-2026)
Table 47. Global Data-Center Power Monitoring IC Sale Price by Company (2021-2026) & (US$/Unit)
Table 48. Key Manufacturers Data-Center Power Monitoring IC Producing Area Distribution and Sales Area
Table 49. Players Data-Center Power Monitoring IC Products Offered
Table 50. Data-Center Power Monitoring IC Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 51. New Products and Potential Entrants
Table 52. Market M&A Activity & Strategy
Table 53. Global Data-Center Power Monitoring IC Sales by Geographic Region (2021-2026) & (Million Units)
Table 54. Global Data-Center Power Monitoring IC Sales Market Share Geographic Region (2021-2026)
Table 55. Global Data-Center Power Monitoring IC Revenue by Geographic Region (2021-2026) & ($ millions)
Table 56. Global Data-Center Power Monitoring IC Revenue Market Share by Geographic Region (2021-2026)
Table 57. Global Data-Center Power Monitoring IC Sales by Country/Region (2021-2026) & (Million Units)
Table 58. Global Data-Center Power Monitoring IC Sales Market Share by Country/Region (2021-2026)
Table 59. Global Data-Center Power Monitoring IC Revenue by Country/Region (2021-2026) & ($ millions)
Table 60. Global Data-Center Power Monitoring IC Revenue Market Share by Country/Region (2021-2026)
Table 61. Americas Data-Center Power Monitoring IC Sales by Country (2021-2026) & (Million Units)
Table 62. Americas Data-Center Power Monitoring IC Sales Market Share by Country (2021-2026)
Table 63. Americas Data-Center Power Monitoring IC Revenue by Country (2021-2026) & ($ millions)
Table 64. Americas Data-Center Power Monitoring IC Sales by Type (2021-2026) & (Million Units)
Table 65. Americas Data-Center Power Monitoring IC Sales by Application (2021-2026) & (Million Units)
Table 66. APAC Data-Center Power Monitoring IC Sales by Region (2021-2026) &

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(Million Units)
Table 67. APAC Data-Center Power Monitoring IC Sales Market Share by Region (2021-2026)
Table 68. APAC Data-Center Power Monitoring IC Revenue by Region (2021-2026) & ($ millions)
Table 69. APAC Data-Center Power Monitoring IC Sales by Type (2021-2026) & (Million Units)
Table 70. APAC Data-Center Power Monitoring IC Sales by Application (2021-2026) & (Million Units)
Table 71. Europe Data-Center Power Monitoring IC Sales by Country (2021-2026) & (Million Units)
Table 72. Europe Data-Center Power Monitoring IC Revenue by Country (2021-2026) & ($ millions)
Table 73. Europe Data-Center Power Monitoring IC Sales by Type (2021-2026) & (Million Units)
Table 74. Europe Data-Center Power Monitoring IC Sales by Application (2021-2026) & (Million Units)
Table 75. Middle East & Africa Data-Center Power Monitoring IC Sales by Country (2021-2026) & (Million Units)
Table 76. Middle East & Africa Data-Center Power Monitoring IC Revenue Market Share by Country (2021-2026)
Table 77. Middle East & Africa Data-Center Power Monitoring IC Sales by Type (2021-2026) & (Million Units)
Table 78. Middle East & Africa Data-Center Power Monitoring IC Sales by Application (2021-2026) & (Million Units)
Table 79. Key Market Drivers & Growth Opportunities of Data-Center Power Monitoring IC
Table 80. Key Market Challenges & Risks of Data-Center Power Monitoring IC
Table 81. Key Industry Trends of Data-Center Power Monitoring IC
Table 82. Data-Center Power Monitoring IC Raw Material
Table 83. Key Suppliers of Raw Materials
Table 84. Data-Center Power Monitoring IC Distributors List
Table 85. Data-Center Power Monitoring IC Customer List
Table 86. Global Data-Center Power Monitoring IC Sales Forecast by Region (2027-2032) & (Million Units)
Table 87. Global Data-Center Power Monitoring IC Revenue Forecast by Region (2027-2032) & ($ millions)
Table 88. Americas Data-Center Power Monitoring IC Sales Forecast by Country (2027-2032) & (Million Units)

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Table 89. Americas Data-Center Power Monitoring IC Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 90. APAC Data-Center Power Monitoring IC Sales Forecast by Region (2027-2032) & (Million Units)
Table 91. APAC Data-Center Power Monitoring IC Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 92. Europe Data-Center Power Monitoring IC Sales Forecast by Country (2027-2032) & (Million Units)
Table 93. Europe Data-Center Power Monitoring IC Revenue Forecast by Country (2027-2032) & ($ millions)
Table 94. Middle East & Africa Data-Center Power Monitoring IC Sales Forecast by Country (2027-2032) & (Million Units)
Table 95. Middle East & Africa Data-Center Power Monitoring IC Revenue Forecast by Country (2027-2032) & ($ millions)
Table 96. Global Data-Center Power Monitoring IC Sales Forecast by Type (2027-2032) & (Million Units)
Table 97. Global Data-Center Power Monitoring IC Revenue Forecast by Type (2027-2032) & ($ millions)
Table 98. Global Data-Center Power Monitoring IC Sales Forecast by Application (2027-2032) & (Million Units)
Table 99. Global Data-Center Power Monitoring IC Revenue Forecast by Application (2027-2032) & ($ millions)
Table 100. MediaTek Inc. Basic Information, Data-Center Power Monitoring IC Manufacturing Base, Sales Area and Its Competitors
Table 101. MediaTek Inc. Data-Center Power Monitoring IC Product Portfolios and Specifications
Table 102. MediaTek Inc. Data-Center Power Monitoring IC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 103. MediaTek Inc. Main Business
Table 104. MediaTek Inc. Latest Developments
Table 105. Texas Instruments Incorporated Basic Information, Data-Center Power Monitoring IC Manufacturing Base, Sales Area and Its Competitors
Table 106. Texas Instruments Incorporated Data-Center Power Monitoring IC Product Portfolios and Specifications
Table 107. Texas Instruments Incorporated Data-Center Power Monitoring IC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 108. Texas Instruments Incorporated Main Business
Table 109. Texas Instruments Incorporated Latest Developments
Table 110. STMicroelectronics N.V. Basic Information, Data-Center Power Monitoring

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IC Manufacturing Base, Sales Area and Its Competitors
Table 111. STMicroelectronics N.V. Data-Center Power Monitoring IC Product Portfolios and Specifications
Table 112. STMicroelectronics N.V. Data-Center Power Monitoring IC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 113. STMicroelectronics N.V. Main Business
Table 114. STMicroelectronics N.V. Latest Developments
Table 115. Analog Devices, Inc. Basic Information, Data-Center Power Monitoring IC Manufacturing Base, Sales Area and Its Competitors
Table 116. Analog Devices, Inc. Data-Center Power Monitoring IC Product Portfolios and Specifications
Table 117. Analog Devices, Inc. Data-Center Power Monitoring IC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 118. Analog Devices, Inc. Main Business
Table 119. Analog Devices, Inc. Latest Developments
Table 120. Renesas Electronics Corporation Basic Information, Data-Center Power Monitoring IC Manufacturing Base, Sales Area and Its Competitors
Table 121. Renesas Electronics Corporation Data-Center Power Monitoring IC Product Portfolios and Specifications
Table 122. Renesas Electronics Corporation Data-Center Power Monitoring IC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 123. Renesas Electronics Corporation Main Business
Table 124. Renesas Electronics Corporation Latest Developments
Table 125. ON Semiconductor Corporation Basic Information, Data-Center Power Monitoring IC Manufacturing Base, Sales Area and Its Competitors
Table 126. ON Semiconductor Corporation Data-Center Power Monitoring IC Product Portfolios and Specifications
Table 127. ON Semiconductor Corporation Data-Center Power Monitoring IC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 128. ON Semiconductor Corporation Main Business
Table 129. ON Semiconductor Corporation Latest Developments
Table 130. Microchip Technology Incorporated Basic Information, Data-Center Power Monitoring IC Manufacturing Base, Sales Area and Its Competitors
Table 131. Microchip Technology Incorporated Data-Center Power Monitoring IC Product Portfolios and Specifications
Table 132. Microchip Technology Incorporated Data-Center Power Monitoring IC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 133. Microchip Technology Incorporated Main Business
Table 134. Microchip Technology Incorporated Latest Developments

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Table 135. Monolithic Power Systems, Inc. Basic Information, Data-Center Power Monitoring IC Manufacturing Base, Sales Area and Its Competitors
Table 136. Monolithic Power Systems, Inc. Data-Center Power Monitoring IC Product Portfolios and Specifications
Table 137. Monolithic Power Systems, Inc. Data-Center Power Monitoring IC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 138. Monolithic Power Systems, Inc. Main Business
Table 139. Monolithic Power Systems, Inc. Latest Developments
Table 140. Allegro MicroSystems, Inc. Basic Information, Data-Center Power Monitoring IC Manufacturing Base, Sales Area and Its Competitors
Table 141. Allegro MicroSystems, Inc. Data-Center Power Monitoring IC Product Portfolios and Specifications
Table 142. Allegro MicroSystems, Inc. Data-Center Power Monitoring IC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 143. Allegro MicroSystems, Inc. Main Business
Table 144. Allegro MicroSystems, Inc. Latest Developments
Table 145. SG Micro Corp Basic Information, Data-Center Power Monitoring IC Manufacturing Base, Sales Area and Its Competitors
Table 146. SG Micro Corp Data-Center Power Monitoring IC Product Portfolios and Specifications
Table 147. SG Micro Corp Data-Center Power Monitoring IC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 148. SG Micro Corp Main Business
Table 149. SG Micro Corp Latest Developments
Table 150. 3PEAK INCORPORATED Basic Information, Data-Center Power Monitoring IC Manufacturing Base, Sales Area and Its Competitors
Table 151. 3PEAK INCORPORATED Data-Center Power Monitoring IC Product Portfolios and Specifications
Table 152. 3PEAK INCORPORATED Data-Center Power Monitoring IC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 153. 3PEAK INCORPORATED Main Business
Table 154. 3PEAK INCORPORATED Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of Data-Center Power Monitoring IC
Figure 2. Data-Center Power Monitoring IC Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global Data-Center Power Monitoring IC Sales Growth Rate 2021-2032 (Million Units)
Figure 7. Global Data-Center Power Monitoring IC Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. Data-Center Power Monitoring IC Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. Data-Center Power Monitoring IC Sales Market Share by Country/Region (2025)
Figure 10. Data-Center Power Monitoring IC Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of Standalone Digital Power Monitor IC
Figure 12. Product Picture of Hot-Swap / Protection IC with Power Monitoring
Figure 13. Product Picture of Other
Figure 14. Global Data-Center Power Monitoring IC Sales Market Share by Type in 2026
Figure 15. Global Data-Center Power Monitoring IC Revenue Market Share by Type (2021-2026)
Figure 16. Product Picture of ?36 V
Figure 17. Product Picture of >36–60 V
Figure 18. Product Picture of >60–100 V
Figure 19. Product Picture of >100 V
Figure 20. Global Data-Center Power Monitoring IC Sales Market Share by Bus Voltage Rating in 2026
Figure 21. Global Data-Center Power Monitoring IC Revenue Market Share by Bus Voltage Rating (2021-2026)
Figure 22. Product Picture of 1 Channel
Figure 23. Product Picture of 2 Channels
Figure 24. Product Picture of 3–4 Channels
Figure 25. Product Picture of ?5 Channels
Figure 26. Global Data-Center Power Monitoring IC Sales Market Share by Number of

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Monitoring Channels in 2026
Figure 27. Global Data-Center Power Monitoring IC Revenue Market Share by Number of Monitoring Channels (2021-2026)
Figure 28. Product Picture of External Shunt Sensing
Figure 29. Product Picture of Magnetic / Hall Sensing
Figure 30. Product Picture of Isolated Sensing
Figure 31. Product Picture of Other
Figure 32. Global Data-Center Power Monitoring IC Sales Market Share by Current Sensing Technology in 2026
Figure 33. Global Data-Center Power Monitoring IC Revenue Market Share by Current Sensing Technology (2021-2026)
Figure 34. Data-Center Power Monitoring IC Consumed in Cloud & Hyperscale Data Centers
Figure 35. Global Data-Center Power Monitoring IC Market: Cloud & Hyperscale Data Centers (2021-2026) & (Million Units)
Figure 36. Data-Center Power Monitoring IC Consumed in AI & High-Performance Computing Data Centers
Figure 37. Global Data-Center Power Monitoring IC Market: AI & High-Performance Computing Data Centers (2021-2026) & (Million Units)
Figure 38. Data-Center Power Monitoring IC Consumed in Telecom & Edge Data Centers
Figure 39. Global Data-Center Power Monitoring IC Market: Telecom & Edge Data Centers (2021-2026) & (Million Units)
Figure 40. Data-Center Power Monitoring IC Consumed in Government & Research Data Centers
Figure 41. Global Data-Center Power Monitoring IC Market: Government & Research Data Centers (2021-2026) & (Million Units)
Figure 42. Data-Center Power Monitoring IC Consumed in Other
Figure 43. Global Data-Center Power Monitoring IC Market: Other (2021-2026) & (Million Units)
Figure 44. Global Data-Center Power Monitoring IC Sale Market Share by Application (2025)
Figure 45. Global Data-Center Power Monitoring IC Revenue Market Share by Application in 2025
Figure 46. Data-Center Power Monitoring IC Sales by Company in 2025 (Million Units)
Figure 47. Global Data-Center Power Monitoring IC Sales Market Share by Company in 2025
Figure 48. Data-Center Power Monitoring IC Revenue by Company in 2025 ($ millions)
Figure 49. Global Data-Center Power Monitoring IC Revenue Market Share by

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Company in 2025
Figure 50. Global Data-Center Power Monitoring IC Sales Market Share by Geographic Region (2021-2026)
Figure 51. Global Data-Center Power Monitoring IC Revenue Market Share by Geographic Region in 2025
Figure 52. Americas Data-Center Power Monitoring IC Sales 2021-2026 (Million Units)
Figure 53. Americas Data-Center Power Monitoring IC Revenue 2021-2026 ($ millions)
Figure 54. APAC Data-Center Power Monitoring IC Sales 2021-2026 (Million Units)
Figure 55. APAC Data-Center Power Monitoring IC Revenue 2021-2026 ($ millions)
Figure 56. Europe Data-Center Power Monitoring IC Sales 2021-2026 (Million Units)
Figure 57. Europe Data-Center Power Monitoring IC Revenue 2021-2026 ($ millions)
Figure 58. Middle East & Africa Data-Center Power Monitoring IC Sales 2021-2026 (Million Units)
Figure 59. Middle East & Africa Data-Center Power Monitoring IC Revenue 2021-2026 ($ millions)
Figure 60. Americas Data-Center Power Monitoring IC Sales Market Share by Country in 2025
Figure 61. Americas Data-Center Power Monitoring IC Revenue Market Share by Country (2021-2026)
Figure 62. Americas Data-Center Power Monitoring IC Sales Market Share by Type (2021-2026)
Figure 63. Americas Data-Center Power Monitoring IC Sales Market Share by Application (2021-2026)
Figure 64. United States Data-Center Power Monitoring IC Revenue Growth 2021-2026 ($ millions)
Figure 65. Canada Data-Center Power Monitoring IC Revenue Growth 2021-2026 ($ millions)
Figure 66. Mexico Data-Center Power Monitoring IC Revenue Growth 2021-2026 ($ millions)
Figure 67. Brazil Data-Center Power Monitoring IC Revenue Growth 2021-2026 ($ millions)
Figure 68. APAC Data-Center Power Monitoring IC Sales Market Share by Region in 2025
Figure 69. APAC Data-Center Power Monitoring IC Revenue Market Share by Region (2021-2026)
Figure 70. APAC Data-Center Power Monitoring IC Sales Market Share by Type (2021-2026)
Figure 71. APAC Data-Center Power Monitoring IC Sales Market Share by Application (2021-2026)

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Figure 72. China Data-Center Power Monitoring IC Revenue Growth 2021-2026 ($ millions)
Figure 73. Japan Data-Center Power Monitoring IC Revenue Growth 2021-2026 ($ millions)
Figure 74. South Korea Data-Center Power Monitoring IC Revenue Growth 2021-2026 ($ millions)
Figure 75. Southeast Asia Data-Center Power Monitoring IC Revenue Growth 2021-2026 ($ millions)
Figure 76. India Data-Center Power Monitoring IC Revenue Growth 2021-2026 ($ millions)
Figure 77. Australia Data-Center Power Monitoring IC Revenue Growth 2021-2026 ($ millions)
Figure 78. China Taiwan Data-Center Power Monitoring IC Revenue Growth 2021-2026 ($ millions)
Figure 79. Europe Data-Center Power Monitoring IC Sales Market Share by Country in 2025
Figure 80. Europe Data-Center Power Monitoring IC Revenue Market Share by Country (2021-2026)
Figure 81. Europe Data-Center Power Monitoring IC Sales Market Share by Type (2021-2026)
Figure 82. Europe Data-Center Power Monitoring IC Sales Market Share by Application (2021-2026)
Figure 83. Germany Data-Center Power Monitoring IC Revenue Growth 2021-2026 ($ millions)
Figure 84. France Data-Center Power Monitoring IC Revenue Growth 2021-2026 ($ millions)
Figure 85. UK Data-Center Power Monitoring IC Revenue Growth 2021-2026 ($ millions)
Figure 86. Italy Data-Center Power Monitoring IC Revenue Growth 2021-2026 ($ millions)
Figure 87. Russia Data-Center Power Monitoring IC Revenue Growth 2021-2026 ($ millions)
Figure 88. Middle East & Africa Data-Center Power Monitoring IC Sales Market Share by Country (2021-2026)
Figure 89. Middle East & Africa Data-Center Power Monitoring IC Sales Market Share by Type (2021-2026)
Figure 90. Middle East & Africa Data-Center Power Monitoring IC Sales Market Share by Application (2021-2026)
Figure 91. Egypt Data-Center Power Monitoring IC Revenue Growth 2021-2026 ($

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millions)
Figure 92. South Africa Data-Center Power Monitoring IC Revenue Growth 2021-2026 ($ millions)
Figure 93. Israel Data-Center Power Monitoring IC Revenue Growth 2021-2026 ($ millions)
Figure 94. Turkey Data-Center Power Monitoring IC Revenue Growth 2021-2026 ($ millions)
Figure 95. GCC Countries Data-Center Power Monitoring IC Revenue Growth 2021-2026 ($ millions)
Figure 96. Manufacturing Cost Structure Analysis of Data-Center Power Monitoring IC in 2026
Figure 97. Manufacturing Process Analysis of Data-Center Power Monitoring IC
Figure 98. Industry Chain Structure of Data-Center Power Monitoring IC
Figure 99. Channels of Distribution
Figure 100. Global Data-Center Power Monitoring IC Sales Market Forecast by Region (2027-2032)
Figure 101. Global Data-Center Power Monitoring IC Revenue Market Share Forecast by Region (2027-2032)
Figure 102. Global Data-Center Power Monitoring IC Sales Market Share Forecast by Type (2027-2032)
Figure 103. Global Data-Center Power Monitoring IC Revenue Market Share Forecast by Type (2027-2032)
Figure 104. Global Data-Center Power Monitoring IC Sales Market Share Forecast by Application (2027-2032)
Figure 105. Global Data-Center Power Monitoring IC Revenue Market Share Forecast by Application (2027-2032)

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