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Global Glucose Monitoring Sensor IC Market Growth 2026-2032

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Abstracts

The global Glucose Monitoring Sensor IC market size is predicted to grow from US$ 571 million in 2025 to US$ 1349 million in 2032; it is expected to grow at a CAGR of 12.9% from 2026 to 2032.

Glucose Monitoring Sensor IC refers to a dedicated or highly integrated semiconductor device that interfaces directly with a glucose-sensing element and converts weak electrochemical, impedance, voltage, current, or optical signals into data that can be processed by a monitoring system. The market primarily covers standalone electrochemical analog front-end ICs, microcontrollers with integrated glucose-sensing analog front ends, integrated sensor SoCs, and custom sensor ASICs developed for specific sensing chemistries or device platforms. Core functions typically include sensor biasing, potentiostat control, transimpedance amplification, programmable gain, low-noise filtering, high-resolution analog-to-digital conversion, digital-to-analog conversion, temperature measurement, electrode diagnostics, calibration support, and ultra-low-power management. More highly integrated products may incorporate embedded processing, memory, power control, NFC, or Bluetooth Low Energy connectivity. The research scope focuses on semiconductor devices that directly acquire or process glucose sensor signals in continuous glucose monitoring systems, conventional blood glucose meters, professional monitoring equipment, and multi-analyte biosensing platforms.

Key Findings

The verified Core Formal List contains 13 manufacturers with direct glucose-sensing IC capabilities

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Custom and captive CGM sensor ASICs represent roughly three-fifths of modeled semiconductor value

Standalone and integrated electrochemical AFEs remain the dominant commercial product architecture

North America is the most mature demand market while China shows the fastest local supply expansion

Market Trends

Glucose Monitoring Sensor IC development is shifting from basic current acquisition toward multichannel sensing, multi-electrode control, embedded diagnostics, impedance measurement, digital calibration, and multi-analyte capability. Product upgrades increasingly emphasize lower input noise, reduced offset and drift, smaller WLCSP packages, longer battery life, and improved compatibility with different sensor chemistries. A second major direction is functional integration. Suppliers are combining the analog front end with microcontrollers, battery switching, NFC, Bluetooth Low Energy, security, and local signal processing to reduce component count and simplify wearable system design. Merchant AFEs remain important for emerging device manufacturers seeking shorter development cycles, while leading continuous glucose monitoring companies continue to favor custom or deeply customized ASICs. Over the longer term, glucose sensing platforms are expected to extend toward simultaneous measurement of ketones, lactate, uric acid, and other biomarkers, increasing the value of configurable multichannel architectures.

Market Dynamics

Drivers

The principal demand driver is the continuing expansion of continuous glucose monitoring from intensive insulin management into broader populations with type 2 diabetes, non-insulin treatment, and preventive health-management needs. Repeated replacement of disposable CGM sensors generates substantially higher annual semiconductor demand per active user than durable blood glucose meters. Regulatory acceptance of over-the-counter monitoring, wider reimbursement, improved sensor wear duration, and greater integration with automated insulin-delivery systems are supporting adoption. Conventional blood glucose monitoring also remains important in cost-sensitive markets, sustaining demand for low-cost integrated analog MCUs. On the

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supply side, advances in low-noise analog design, ultra-low-power operation, small-form-factor packaging, and programmable sensor interfaces are enabling more semiconductor companies to address glucose sensing without developing every analog function from discrete components.

Restraints

Market expansion is constrained by long medical-device qualification cycles, strict traceability requirements, and the need to validate each IC against a specific sensor chemistry, electrode structure, calibration method, and operating environment. Performance demonstrated in laboratory conditions does not automatically translate into stable multi-day or multi-week operation, where temperature variation, biofouling, electrode ageing, interference, and baseline drift can materially affect accuracy. Large-volume medical customers also exert significant price pressure, particularly once a product enters mature production. Standard merchant IC suppliers must compete with custom ASICs optimized for individual platforms, while smaller semiconductor companies may lack the quality systems, application databases, manufacturing consistency, and long-term supply commitments required by leading medical-device manufacturers.

Opportunities

The strongest opportunity lies in supplying standardized but highly configurable electrochemical AFEs to emerging CGM manufacturers that cannot justify the cost or development cycle of a fully custom ASIC. Integration of the sensing front end with wireless connectivity, power management, security, and embedded processing can create additional design value while reducing board area and system power. Multi-analyte sensing is another important opportunity, as common electrochemical architectures can be adapted to monitor glucose together with ketones, lactate, uric acid, or other biomarkers. Localized semiconductor supply in China also creates opportunities for domestic design houses offering smaller packages, lower-voltage operation, reference designs, and local engineering support. Products that support both conventional blood glucose meters and wearable continuous monitoring may address a broader customer base and improve platform reuse.

Challenges

The industry faces persistent challenges in balancing measurement accuracy, power consumption, package size, manufacturability, and cost. Sensor output characteristics

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vary materially across enzyme formulations, membrane structures, electrode materials, insertion sites, and operating lifetimes, limiting the degree to which one standard IC can serve every platform without customization. Suppliers must also manage intellectual-property exposure, medical liability, cybersecurity, and design-change control over extended product lifecycles. New entrants may secure technical samples but still face lengthy customer qualification and regulatory submission processes before meaningful volume production begins. At the same time, increasing integration can reduce the number of chips used per sensor and place downward pressure on average selling prices, requiring manufacturers to offset unit-value erosion through higher shipment volumes, broader application coverage, or higher-value diagnostic and processing functions.

Industry Chain Analysis

The upstream industry chain consists of precision analog and mixed-signal intellectual property, semiconductor materials, wafer fabrication, specialty process technologies, packaging substrates, WLCSP services, testing equipment, and medical-grade quality-control resources. Glucose Monitoring Sensor ICs require low-leakage devices, stable references, precision amplifiers, high-resolution converters, and reliable low-power process platforms. Packaging is particularly important for wearable systems because die size, moisture resistance, thermal behavior, and assembly yield directly affect sensor dimensions and manufacturing cost. Fabless suppliers rely on qualified foundry and outsourced assembly and test partners, while larger integrated device manufacturers retain more control over process selection, capacity planning, and long-term supply.

The midstream segment covers IC architecture, analog design, firmware, calibration tools, reference designs, sensor-interface validation, wafer production, packaging, and final testing. Downstream value is created through integration with electrochemical electrodes, enzymes, membranes, flexible probes, batteries, wireless modules, algorithms, and medical-device platforms. The highest semiconductor value is generally associated with proprietary analog performance, sensor-specific application knowledge, diagnostic capability, and successful medical qualification rather than wafer processing alone. Cost structures are influenced by die area, analog test time, package type, calibration requirements, production yield, and customer-specific engineering. Custom ASIC projects may provide greater platform control and customer retention, while merchant products can achieve better design reuse across multiple monitoring systems.

Segment Insights

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By product type, custom and internally developed CGM sensor ASICs account for approximately three-fifths of the modeled semiconductor value, reflecting the preference of leading system manufacturers for architectures tailored to proprietary sensor chemistry and calibration methods. Standard merchant CGM analog front ends represent slightly more than one-fifth of modeled value and provide the principal accessible market for independent semiconductor suppliers. Integrated analog MCUs used in conventional blood glucose meters account for a low-teen percentage share, while regional suppliers, white-label products, and unidentified custom designs form the remaining long tail. Standalone AFEs currently offer the broadest design flexibility, whereas integrated sensor SoCs are expected to gain relevance as wearable devices prioritize smaller size, lower power, and fewer external components.

By application, continuous glucose monitoring generates most incremental market demand because each active user requires repeated sensor replacements throughout the year. Conventional blood glucose metering remains a significant unit-volume segment but has lower semiconductor value per measurement system and greater price sensitivity. Multi-analyte monitoring is currently smaller but represents one of the most attractive technical growth directions, particularly for platforms that can reuse common potentiostat, transimpedance, conversion, and diagnostic blocks. Professional and clinical monitoring applications form a more specialized segment in which reliability, traceability, data integrity, and compatibility with regulated workflows are more important than minimum component cost.

Downstream Market Opportunities

Prescription continuous glucose monitoring remains the principal commercial application, supported by diabetes treatment, insulin dosing, and automated insulin-delivery systems. The next major opportunity is over-the-counter and non-insulin-use monitoring, where simplified onboarding, longer wear duration, compact sensors, and lower system cost can broaden adoption. Conventional blood glucose meters continue to offer opportunities in cost-sensitive and emerging markets, particularly for integrated analog MCUs that reduce bill-of-material cost. Multi-analyte wearable devices may create a new layer of demand by combining glucose readings with ketone, lactate, or other metabolic indicators. Semiconductor suppliers with configurable interfaces, validated reference designs, and strong application support are positioned to benefit as smaller medical-device companies seek faster product development without building a proprietary sensing ASIC from the ground up.

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Regional Insights

North America is assessed as the largest and most commercially mature regional market, supported by extensive CGM adoption, established reimbursement channels, leading medical-device manufacturers, and an active regulatory pathway for prescription and over-the-counter products. The region also contains several of the largest precision analog and mixed-signal semiconductor suppliers. Europe has a strong medical-technology base and growing CGM adoption, although reimbursement and procurement conditions vary across national healthcare systems. Japan and Taiwan retain particular strength in integrated analog MCUs and conventional blood glucose meter electronics.

China represents the fastest-expanding local supply base for Glucose Monitoring Sensor ICs. Domestic companies are introducing dedicated CGM AFEs, programmable biosensing front ends, compact WLCSP devices, and increasingly integrated sensor platforms. Local growth is supported by the expansion of domestic CGM manufacturers, supply-chain localization, and demand for lower-cost alternatives with local technical support. South Korea and Southeast Asia currently play a larger role in semiconductor manufacturing, assembly, and testing than in defining proprietary glucose-sensing IC products, while India and other emerging regions remain primarily downstream demand and device-assembly markets.

Competitive Landscape Analysis

The competitive structure comprises 13 verified core manufacturers and a broader group of platform, peripheral, and potential suppliers. Established global analog and MCU companies compete through precision signal-chain technology, manufacturing scale, long product lifecycles, quality systems, and global customer support. Their portfolios range from programmable electrochemical AFEs to microcontrollers with integrated converters, amplifiers, and sensor-bias functions. A second group of Asian semiconductor companies combines blood glucose meter experience, low-cost mixed-signal integration, and regional customer access. Chinese specialist suppliers are entering through dedicated CGM AFEs, smaller packages, lower-voltage designs, multichannel capability, and complete reference solutions, although their commercial scale and medical qualification history remain less transparent. Competition cannot be assessed solely through merchant product revenue because leading CGM system manufacturers frequently use captive or customer-specific ASICs. The strategic contest is therefore between reusable standard platforms and proprietary silicon optimized for individual sensor systems. Long-term differentiation will depend on measurement stability, application knowledge, successful regulatory design-in, manufacturing

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consistency, secure supply, and the ability to support multiple sensor generations.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Glucose Monitoring Sensor 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 Glucose Monitoring Sensor IC portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Glucose Monitoring Sensor IC market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Glucose Monitoring Sensor 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 Glucose Monitoring Sensor IC.

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

Market Segmentation

Segmentation by Type:

Standalone Analog Front End IC

MCU with Integrated Sensor AFE

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Integrated Sensor SoC

Custom Sensor ASIC

Other

Segmentation by Supply Model:

Standard Merchant IC

Application-Specific Standard Product

Customer-Specific ASIC

Captive / Internally Developed IC

Other

Segmentation by Electrode Configuration:

Two-Electrode Configuration

Three-Electrode Configuration

Four-Electrode Configuration

Multi-Electrode Configuration

Other

Segmentation by Number of Sensing Channels:

Single-Channel IC

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Dual-Channel IC

Multi-Channel IC

Other

Segmentation by Application:

Continuous Glucose Monitoring

Blood Glucose Metering

Professional Glucose Monitoring

Multi-Analyte Monitoring

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

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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.

Texas Instruments Incorporated

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Analog Devices, Inc.

NXP Semiconductors N.V.

Renesas Electronics Corporation

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Microchip Technology Incorporated

Infineon Technologies AG

Shenzhen Goodix Technology Co., Ltd.

Holtek Semiconductor Inc.

Shenzhen Leto Technology Co., Ltd.

Nanochap Electronics Co., Ltd.

Xmoore Microelectronics (Suzhou) Co., Ltd.

Shen An Micro Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Glucose Monitoring Sensor IC market?

What factors are driving Glucose Monitoring Sensor IC market growth, globally and by region?

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

How do Glucose Monitoring Sensor IC market opportunities vary by end market size?

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How does Glucose Monitoring Sensor 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 Glucose Monitoring Sensor IC Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for Glucose Monitoring Sensor IC by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for Glucose Monitoring Sensor IC by Country/Region, 2021, 2025 & 2032
2.2 Glucose Monitoring Sensor IC Segment by Type
  2.2.1 Standalone Analog Front End IC
  2.2.2 MCU with Integrated Sensor AFE
  2.2.3 Integrated Sensor SoC
  2.2.4 Custom Sensor ASIC
  2.2.5 Other
  2.2.6 Glucose Monitoring Sensor IC Sales by Type
    2.2.6.1 Global Glucose Monitoring Sensor IC Sales Market Share by Type (2021-2026)
    2.2.6.2 Global Glucose Monitoring Sensor IC Revenue and Market Share by Type (2021-2026)
    2.2.6.3 Global Glucose Monitoring Sensor IC Sale Price by Type (2021-2026)
2.3 Glucose Monitoring Sensor IC Segment by Supply Model
  2.3.1 Standard Merchant IC
  2.3.2 Application-Specific Standard Product
  2.3.3 Customer-Specific ASIC
  2.3.4 Captive / Internally Developed IC
  2.3.5 Other

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2.3.6 Glucose Monitoring Sensor IC Sales by Supply Model
2.3.6.1 Global Glucose Monitoring Sensor IC Sales Market Share by Supply Model (2021-2026)
2.3.6.2 Global Glucose Monitoring Sensor IC Revenue and Market Share by Supply Model (2021-2026)
2.3.6.3 Global Glucose Monitoring Sensor IC Sale Price by Supply Model (2021-2026)
2.4 Glucose Monitoring Sensor IC Segment by Electrode Configuration
2.4.1 Two-Electrode Configuration
2.4.2 Three-Electrode Configuration
2.4.3 Four-Electrode Configuration
2.4.4 Multi-Electrode Configuration
2.4.5 Other
2.4.6 Glucose Monitoring Sensor IC Sales by Electrode Configuration
2.4.6.1 Global Glucose Monitoring Sensor IC Sales Market Share by Electrode Configuration (2021-2026)
2.4.6.2 Global Glucose Monitoring Sensor IC Revenue and Market Share by Electrode Configuration (2021-2026)
2.4.6.3 Global Glucose Monitoring Sensor IC Sale Price by Electrode Configuration (2021-2026)
2.5 Glucose Monitoring Sensor IC Segment by Number of Sensing Channels
2.5.1 Single-Channel IC
2.5.2 Dual-Channel IC
2.5.3 Multi-Channel IC
2.5.4 Other
2.5.5 Glucose Monitoring Sensor IC Sales by Number of Sensing Channels
2.5.5.1 Global Glucose Monitoring Sensor IC Sales Market Share by Number of Sensing Channels (2021-2026)
2.5.5.2 Global Glucose Monitoring Sensor IC Revenue and Market Share by Number of Sensing Channels (2021-2026)
2.5.5.3 Global Glucose Monitoring Sensor IC Sale Price by Number of Sensing Channels (2021-2026)
2.6 Glucose Monitoring Sensor IC Segment by Application
2.6.1 Continuous Glucose Monitoring
2.6.2 Blood Glucose Metering
2.6.3 Professional Glucose Monitoring
2.6.4 Multi-Analyte Monitoring
2.6.5 Other
2.6.6 Glucose Monitoring Sensor IC Sales by Application

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info@marketpublishers.com

2.6.6.1 Global Glucose Monitoring Sensor IC Sale Market Share by Application (2021-2026)
2.6.6.2 Global Glucose Monitoring Sensor IC Revenue and Market Share by Application (2021-2026)
2.6.6.3 Global Glucose Monitoring Sensor IC Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

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

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

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(2021-2026)
4.2.2 Global Glucose Monitoring Sensor IC Annual Revenue by Country/Region (2021-2026)
4.3 Americas Glucose Monitoring Sensor IC Sales Growth
4.4 APAC Glucose Monitoring Sensor IC Sales Growth
4.5 Europe Glucose Monitoring Sensor IC Sales Growth
4.6 Middle East & Africa Glucose Monitoring Sensor IC Sales Growth

5 AMERICAS

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

6 APAC

6.1 APAC Glucose Monitoring Sensor IC Sales by Region
6.1.1 APAC Glucose Monitoring Sensor IC Sales by Region (2021-2026)
6.1.2 APAC Glucose Monitoring Sensor IC Revenue by Region (2021-2026)
6.2 APAC Glucose Monitoring Sensor IC Sales by Type (2021-2026)
6.3 APAC Glucose Monitoring Sensor 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 Glucose Monitoring Sensor IC by Country
7.1.1 Europe Glucose Monitoring Sensor IC Sales by Country (2021-2026)

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info@marketpublishers.com

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

11 MARKETING, DISTRIBUTORS AND CUSTOMER

+357 96 030922
info@marketpublishers.com

11.1 Sales Channel
11.1.1 Direct Channels
11.1.2 Indirect Channels
11.2 Glucose Monitoring Sensor IC Distributors
11.3 Glucose Monitoring Sensor IC Customer

12 WORLD FORECAST REVIEW FOR GLUCOSE MONITORING SENSOR IC BY GEOGRAPHIC REGION

12.1 Global Glucose Monitoring Sensor IC Market Size Forecast by Region
12.1.1 Global Glucose Monitoring Sensor IC Forecast by Region (2027-2032)
12.1.2 Global Glucose Monitoring Sensor 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 Glucose Monitoring Sensor IC Forecast by Type (2027-2032)
12.7 Global Glucose Monitoring Sensor IC Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Texas Instruments Incorporated
13.1.1 Texas Instruments Incorporated Company Information
13.1.2 Texas Instruments Incorporated Glucose Monitoring Sensor IC Product Portfolios and Specifications
13.1.3 Texas Instruments Incorporated Glucose Monitoring Sensor IC Sales, Revenue, Price and Gross Margin (2021-2026)
13.1.4 Texas Instruments Incorporated Main Business Overview
13.1.5 Texas Instruments Incorporated Latest Developments
13.2 Analog Devices, Inc.
13.2.1 Analog Devices, Inc. Company Information
13.2.2 Analog Devices, Inc. Glucose Monitoring Sensor IC Product Portfolios and Specifications
13.2.3 Analog Devices, Inc. Glucose Monitoring Sensor IC Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 Analog Devices, Inc. Main Business Overview
13.2.5 Analog Devices, Inc. Latest Developments

+357 96 030922
info@marketpublishers.com

13.3 NXP Semiconductors N.V.
13.3.1 NXP Semiconductors N.V. Company Information
13.3.2 NXP Semiconductors N.V. Glucose Monitoring Sensor IC Product Portfolios and Specifications
13.3.3 NXP Semiconductors N.V. Glucose Monitoring Sensor IC Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 NXP Semiconductors N.V. Main Business Overview
13.3.5 NXP Semiconductors N.V. Latest Developments
13.4 Renesas Electronics Corporation
13.4.1 Renesas Electronics Corporation Company Information
13.4.2 Renesas Electronics Corporation Glucose Monitoring Sensor IC Product Portfolios and Specifications
13.4.3 Renesas Electronics Corporation Glucose Monitoring Sensor IC Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 Renesas Electronics Corporation Main Business Overview
13.4.5 Renesas Electronics Corporation Latest Developments
13.5 onsemi
13.5.1 onsemi Company Information
13.5.2 onsemi Glucose Monitoring Sensor IC Product Portfolios and Specifications
13.5.3 onsemi Glucose Monitoring Sensor IC Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 onsemi Main Business Overview
13.5.5 onsemi Latest Developments
13.6 Microchip Technology Incorporated
13.6.1 Microchip Technology Incorporated Company Information
13.6.2 Microchip Technology Incorporated Glucose Monitoring Sensor IC Product Portfolios and Specifications
13.6.3 Microchip Technology Incorporated Glucose Monitoring Sensor IC Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 Microchip Technology Incorporated Main Business Overview
13.6.5 Microchip Technology Incorporated Latest Developments
13.7 Infineon Technologies AG
13.7.1 Infineon Technologies AG Company Information
13.7.2 Infineon Technologies AG Glucose Monitoring Sensor IC Product Portfolios and Specifications
13.7.3 Infineon Technologies AG Glucose Monitoring Sensor IC Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 Infineon Technologies AG Main Business Overview
13.7.5 Infineon Technologies AG Latest Developments

+357 96 030922
info@marketpublishers.com

13.8 Shenzhen Goodix Technology Co., Ltd.
13.8.1 Shenzhen Goodix Technology Co., Ltd. Company Information
13.8.2 Shenzhen Goodix Technology Co., Ltd. Glucose Monitoring Sensor IC Product Portfolios and Specifications
13.8.3 Shenzhen Goodix Technology Co., Ltd. Glucose Monitoring Sensor IC Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 Shenzhen Goodix Technology Co., Ltd. Main Business Overview
13.8.5 Shenzhen Goodix Technology Co., Ltd. Latest Developments
13.9 Holtek Semiconductor Inc.
13.9.1 Holtek Semiconductor Inc. Company Information
13.9.2 Holtek Semiconductor Inc. Glucose Monitoring Sensor IC Product Portfolios and Specifications
13.9.3 Holtek Semiconductor Inc. Glucose Monitoring Sensor IC Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 Holtek Semiconductor Inc. Main Business Overview
13.9.5 Holtek Semiconductor Inc. Latest Developments
13.10 Shenzhen Leto Technology Co., Ltd.
13.10.1 Shenzhen Leto Technology Co., Ltd. Company Information
13.10.2 Shenzhen Leto Technology Co., Ltd. Glucose Monitoring Sensor IC Product Portfolios and Specifications
13.10.3 Shenzhen Leto Technology Co., Ltd. Glucose Monitoring Sensor IC Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 Shenzhen Leto Technology Co., Ltd. Main Business Overview
13.10.5 Shenzhen Leto Technology Co., Ltd. Latest Developments
13.11 Nanochap Electronics Co., Ltd.
13.11.1 Nanochap Electronics Co., Ltd. Company Information
13.11.2 Nanochap Electronics Co., Ltd. Glucose Monitoring Sensor IC Product Portfolios and Specifications
13.11.3 Nanochap Electronics Co., Ltd. Glucose Monitoring Sensor IC Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 Nanochap Electronics Co., Ltd. Main Business Overview
13.11.5 Nanochap Electronics Co., Ltd. Latest Developments
13.12 Xmoore Microelectronics (Suzhou) Co., Ltd.
13.12.1 Xmoore Microelectronics (Suzhou) Co., Ltd. Company Information
13.12.2 Xmoore Microelectronics (Suzhou) Co., Ltd. Glucose Monitoring Sensor IC Product Portfolios and Specifications
13.12.3 Xmoore Microelectronics (Suzhou) Co., Ltd. Glucose Monitoring Sensor IC Sales, Revenue, Price and Gross Margin (2021-2026)
13.12.4 Xmoore Microelectronics (Suzhou) Co., Ltd. Main Business Overview

+357 96 030922
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13.12.5 Xmoore Microelectronics (Suzhou) Co., Ltd. Latest Developments
13.13 Shen An Micro Co., Ltd.
13.13.1 Shen An Micro Co., Ltd. Company Information
13.13.2 Shen An Micro Co., Ltd. Glucose Monitoring Sensor IC Product Portfolios and Specifications
13.13.3 Shen An Micro Co., Ltd. Glucose Monitoring Sensor IC Sales, Revenue, Price and Gross Margin (2021-2026)
13.13.4 Shen An Micro Co., Ltd. Main Business Overview
13.13.5 Shen An Micro Co., Ltd. Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

+357 96 030922
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List Of Tables

LIST OF TABLES

Table 1. Glucose Monitoring Sensor IC Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. Glucose Monitoring Sensor IC Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of Standalone Analog Front End IC
Table 4. Major Players of MCU with Integrated Sensor AFE
Table 5. Major Players of Integrated Sensor SoC
Table 6. Major Players of Custom Sensor ASIC
Table 7. Major Players of Other
Table 8. Global Glucose Monitoring Sensor IC Sales by Type (2021-2026) & (Million Units)
Table 9. Global Glucose Monitoring Sensor IC Sales Market Share by Type (2021-2026)
Table 10. Global Glucose Monitoring Sensor IC Revenue by Type (2021-2026) & ($ million)
Table 11. Global Glucose Monitoring Sensor IC Revenue Market Share by Type (2021-2026)
Table 12. Global Glucose Monitoring Sensor IC Sale Price by Type (2021-2026) & (US$/Unit)
Table 13. Major Players of Standard Merchant IC
Table 14. Major Players of Application-Specific Standard Product
Table 15. Major Players of Customer-Specific ASIC
Table 16. Major Players of Captive / Internally Developed IC
Table 17. Major Players of Other
Table 18. Global Glucose Monitoring Sensor IC Sales by Supply Model (2021-2026) & (Million Units)
Table 19. Global Glucose Monitoring Sensor IC Sales Market Share by Supply Model (2021-2026)
Table 20. Global Glucose Monitoring Sensor IC Revenue by Supply Model (2021-2026) & ($ million)
Table 21. Global Glucose Monitoring Sensor IC Revenue Market Share by Supply Model (2021-2026)
Table 22. Global Glucose Monitoring Sensor IC Sale Price by Supply Model (2021-2026) & (US$/Unit)
Table 23. Major Players of Two-Electrode Configuration

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Table 24. Major Players of Three-Electrode Configuration
Table 25. Major Players of Four-Electrode Configuration
Table 26. Major Players of Multi-Electrode Configuration
Table 27. Major Players of Other
Table 28. Global Glucose Monitoring Sensor IC Sales by Electrode Configuration (2021-2026) & (Million Units)
Table 29. Global Glucose Monitoring Sensor IC Sales Market Share by Electrode Configuration (2021-2026)
Table 30. Global Glucose Monitoring Sensor IC Revenue by Electrode Configuration (2021-2026) & ($ million)
Table 31. Global Glucose Monitoring Sensor IC Revenue Market Share by Electrode Configuration (2021-2026)
Table 32. Global Glucose Monitoring Sensor IC Sale Price by Electrode Configuration (2021-2026) & (US$/Unit)
Table 33. Major Players of Single-Channel IC
Table 34. Major Players of Dual-Channel IC
Table 35. Major Players of Multi-Channel IC
Table 36. Major Players of Other
Table 37. Global Glucose Monitoring Sensor IC Sales by Number of Sensing Channels (2021-2026) & (Million Units)
Table 38. Global Glucose Monitoring Sensor IC Sales Market Share by Number of Sensing Channels (2021-2026)
Table 39. Global Glucose Monitoring Sensor IC Revenue by Number of Sensing Channels (2021-2026) & ($ million)
Table 40. Global Glucose Monitoring Sensor IC Revenue Market Share by Number of Sensing Channels (2021-2026)
Table 41. Global Glucose Monitoring Sensor IC Sale Price by Number of Sensing Channels (2021-2026) & (US$/Unit)
Table 42. Global Glucose Monitoring Sensor IC Sale by Application (2021-2026) & (Million Units)
Table 43. Global Glucose Monitoring Sensor IC Sale Market Share by Application (2021-2026)
Table 44. Global Glucose Monitoring Sensor IC Revenue by Application (2021-2026) & ($ million)
Table 45. Global Glucose Monitoring Sensor IC Revenue Market Share by Application (2021-2026)
Table 46. Global Glucose Monitoring Sensor IC Sale Price by Application (2021-2026) & (US$/Unit)
Table 47. Global Glucose Monitoring Sensor IC Sales by Company (2021-2026) &

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(Million Units)
Table 48. Global Glucose Monitoring Sensor IC Sales Market Share by Company (2021-2026)
Table 49. Global Glucose Monitoring Sensor IC Revenue by Company (2021-2026) & ($ millions)
Table 50. Global Glucose Monitoring Sensor IC Revenue Market Share by Company (2021-2026)
Table 51. Global Glucose Monitoring Sensor IC Sale Price by Company (2021-2026) & (US$/Unit)
Table 52. Key Manufacturers Glucose Monitoring Sensor IC Producing Area Distribution and Sales Area
Table 53. Players Glucose Monitoring Sensor IC Products Offered
Table 54. Glucose Monitoring Sensor IC Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 55. New Products and Potential Entrants
Table 56. Market M&A Activity & Strategy
Table 57. Global Glucose Monitoring Sensor IC Sales by Geographic Region (2021-2026) & (Million Units)
Table 58. Global Glucose Monitoring Sensor IC Sales Market Share Geographic Region (2021-2026)
Table 59. Global Glucose Monitoring Sensor IC Revenue by Geographic Region (2021-2026) & ($ millions)
Table 60. Global Glucose Monitoring Sensor IC Revenue Market Share by Geographic Region (2021-2026)
Table 61. Global Glucose Monitoring Sensor IC Sales by Country/Region (2021-2026) & (Million Units)
Table 62. Global Glucose Monitoring Sensor IC Sales Market Share by Country/Region (2021-2026)
Table 63. Global Glucose Monitoring Sensor IC Revenue by Country/Region (2021-2026) & ($ millions)
Table 64. Global Glucose Monitoring Sensor IC Revenue Market Share by Country/Region (2021-2026)
Table 65. Americas Glucose Monitoring Sensor IC Sales by Country (2021-2026) & (Million Units)
Table 66. Americas Glucose Monitoring Sensor IC Sales Market Share by Country (2021-2026)
Table 67. Americas Glucose Monitoring Sensor IC Revenue by Country (2021-2026) & ($ millions)
Table 68. Americas Glucose Monitoring Sensor IC Sales by Type (2021-2026) & (Million

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Units)
Table 69. Americas Glucose Monitoring Sensor IC Sales by Application (2021-2026) & (Million Units)
Table 70. APAC Glucose Monitoring Sensor IC Sales by Region (2021-2026) & (Million Units)
Table 71. APAC Glucose Monitoring Sensor IC Sales Market Share by Region (2021-2026)
Table 72. APAC Glucose Monitoring Sensor IC Revenue by Region (2021-2026) & ($ millions)
Table 73. APAC Glucose Monitoring Sensor IC Sales by Type (2021-2026) & (Million Units)
Table 74. APAC Glucose Monitoring Sensor IC Sales by Application (2021-2026) & (Million Units)
Table 75. Europe Glucose Monitoring Sensor IC Sales by Country (2021-2026) & (Million Units)
Table 76. Europe Glucose Monitoring Sensor IC Revenue by Country (2021-2026) & ($ millions)
Table 77. Europe Glucose Monitoring Sensor IC Sales by Type (2021-2026) & (Million Units)
Table 78. Europe Glucose Monitoring Sensor IC Sales by Application (2021-2026) & (Million Units)
Table 79. Middle East & Africa Glucose Monitoring Sensor IC Sales by Country (2021-2026) & (Million Units)
Table 80. Middle East & Africa Glucose Monitoring Sensor IC Revenue Market Share by Country (2021-2026)
Table 81. Middle East & Africa Glucose Monitoring Sensor IC Sales by Type (2021-2026) & (Million Units)
Table 82. Middle East & Africa Glucose Monitoring Sensor IC Sales by Application (2021-2026) & (Million Units)
Table 83. Key Market Drivers & Growth Opportunities of Glucose Monitoring Sensor IC
Table 84. Key Market Challenges & Risks of Glucose Monitoring Sensor IC
Table 85. Key Industry Trends of Glucose Monitoring Sensor IC
Table 86. Glucose Monitoring Sensor IC Raw Material
Table 87. Key Suppliers of Raw Materials
Table 88. Glucose Monitoring Sensor IC Distributors List
Table 89. Glucose Monitoring Sensor IC Customer List
Table 90. Global Glucose Monitoring Sensor IC Sales Forecast by Region (2027-2032) & (Million Units)
Table 91. Global Glucose Monitoring Sensor IC Revenue Forecast by Region

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(2027-2032) & ($ millions)
Table 92. Americas Glucose Monitoring Sensor IC Sales Forecast by Country (2027-2032) & (Million Units)
Table 93. Americas Glucose Monitoring Sensor IC Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 94. APAC Glucose Monitoring Sensor IC Sales Forecast by Region (2027-2032) & (Million Units)
Table 95. APAC Glucose Monitoring Sensor IC Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 96. Europe Glucose Monitoring Sensor IC Sales Forecast by Country (2027-2032) & (Million Units)
Table 97. Europe Glucose Monitoring Sensor IC Revenue Forecast by Country (2027-2032) & ($ millions)
Table 98. Middle East & Africa Glucose Monitoring Sensor IC Sales Forecast by Country (2027-2032) & (Million Units)
Table 99. Middle East & Africa Glucose Monitoring Sensor IC Revenue Forecast by Country (2027-2032) & ($ millions)
Table 100. Global Glucose Monitoring Sensor IC Sales Forecast by Type (2027-2032) & (Million Units)
Table 101. Global Glucose Monitoring Sensor IC Revenue Forecast by Type (2027-2032) & ($ millions)
Table 102. Global Glucose Monitoring Sensor IC Sales Forecast by Application (2027-2032) & (Million Units)
Table 103. Global Glucose Monitoring Sensor IC Revenue Forecast by Application (2027-2032) & ($ millions)
Table 104. Texas Instruments Incorporated Basic Information, Glucose Monitoring Sensor IC Manufacturing Base, Sales Area and Its Competitors
Table 105. Texas Instruments Incorporated Glucose Monitoring Sensor IC Product Portfolios and Specifications
Table 106. Texas Instruments Incorporated Glucose Monitoring Sensor IC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 107. Texas Instruments Incorporated Main Business
Table 108. Texas Instruments Incorporated Latest Developments
Table 109. Analog Devices, Inc. Basic Information, Glucose Monitoring Sensor IC Manufacturing Base, Sales Area and Its Competitors
Table 110. Analog Devices, Inc. Glucose Monitoring Sensor IC Product Portfolios and Specifications
Table 111. Analog Devices, Inc. Glucose Monitoring Sensor IC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)

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Table 112. Analog Devices, Inc. Main Business
Table 113. Analog Devices, Inc. Latest Developments
Table 114. NXP Semiconductors N.V. Basic Information, Glucose Monitoring Sensor IC Manufacturing Base, Sales Area and Its Competitors
Table 115. NXP Semiconductors N.V. Glucose Monitoring Sensor IC Product Portfolios and Specifications
Table 116. NXP Semiconductors N.V. Glucose Monitoring Sensor IC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 117. NXP Semiconductors N.V. Main Business
Table 118. NXP Semiconductors N.V. Latest Developments
Table 119. Renesas Electronics Corporation Basic Information, Glucose Monitoring Sensor IC Manufacturing Base, Sales Area and Its Competitors
Table 120. Renesas Electronics Corporation Glucose Monitoring Sensor IC Product Portfolios and Specifications
Table 121. Renesas Electronics Corporation Glucose Monitoring Sensor IC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 122. Renesas Electronics Corporation Main Business
Table 123. Renesas Electronics Corporation Latest Developments
Table 124. onsemi Basic Information, Glucose Monitoring Sensor IC Manufacturing Base, Sales Area and Its Competitors
Table 125. onsemi Glucose Monitoring Sensor IC Product Portfolios and Specifications
Table 126. onsemi Glucose Monitoring Sensor IC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 127. onsemi Main Business
Table 128. onsemi Latest Developments
Table 129. Microchip Technology Incorporated Basic Information, Glucose Monitoring Sensor IC Manufacturing Base, Sales Area and Its Competitors
Table 130. Microchip Technology Incorporated Glucose Monitoring Sensor IC Product Portfolios and Specifications
Table 131. Microchip Technology Incorporated Glucose Monitoring Sensor IC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 132. Microchip Technology Incorporated Main Business
Table 133. Microchip Technology Incorporated Latest Developments
Table 134. Infineon Technologies AG Basic Information, Glucose Monitoring Sensor IC Manufacturing Base, Sales Area and Its Competitors
Table 135. Infineon Technologies AG Glucose Monitoring Sensor IC Product Portfolios and Specifications
Table 136. Infineon Technologies AG Glucose Monitoring Sensor IC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)

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Table 137. Infineon Technologies AG Main Business
Table 138. Infineon Technologies AG Latest Developments
Table 139. Shenzhen Goodix Technology Co., Ltd. Basic Information, Glucose Monitoring Sensor IC Manufacturing Base, Sales Area and Its Competitors
Table 140. Shenzhen Goodix Technology Co., Ltd. Glucose Monitoring Sensor IC Product Portfolios and Specifications
Table 141. Shenzhen Goodix Technology Co., Ltd. Glucose Monitoring Sensor IC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 142. Shenzhen Goodix Technology Co., Ltd. Main Business
Table 143. Shenzhen Goodix Technology Co., Ltd. Latest Developments
Table 144. Holtek Semiconductor Inc. Basic Information, Glucose Monitoring Sensor IC Manufacturing Base, Sales Area and Its Competitors
Table 145. Holtek Semiconductor Inc. Glucose Monitoring Sensor IC Product Portfolios and Specifications
Table 146. Holtek Semiconductor Inc. Glucose Monitoring Sensor IC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 147. Holtek Semiconductor Inc. Main Business
Table 148. Holtek Semiconductor Inc. Latest Developments
Table 149. Shenzhen Leto Technology Co., Ltd. Basic Information, Glucose Monitoring Sensor IC Manufacturing Base, Sales Area and Its Competitors
Table 150. Shenzhen Leto Technology Co., Ltd. Glucose Monitoring Sensor IC Product Portfolios and Specifications
Table 151. Shenzhen Leto Technology Co., Ltd. Glucose Monitoring Sensor IC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 152. Shenzhen Leto Technology Co., Ltd. Main Business
Table 153. Shenzhen Leto Technology Co., Ltd. Latest Developments
Table 154. Nanochap Electronics Co., Ltd. Basic Information, Glucose Monitoring Sensor IC Manufacturing Base, Sales Area and Its Competitors
Table 155. Nanochap Electronics Co., Ltd. Glucose Monitoring Sensor IC Product Portfolios and Specifications
Table 156. Nanochap Electronics Co., Ltd. Glucose Monitoring Sensor IC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 157. Nanochap Electronics Co., Ltd. Main Business
Table 158. Nanochap Electronics Co., Ltd. Latest Developments
Table 159. Xmoore Microelectronics (Suzhou) Co., Ltd. Basic Information, Glucose Monitoring Sensor IC Manufacturing Base, Sales Area and Its Competitors
Table 160. Xmoore Microelectronics (Suzhou) Co., Ltd. Glucose Monitoring Sensor IC Product Portfolios and Specifications
Table 161. Xmoore Microelectronics (Suzhou) Co., Ltd. Glucose Monitoring Sensor IC

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Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 162. Xmoore Microelectronics (Suzhou) Co., Ltd. Main Business
Table 163. Xmoore Microelectronics (Suzhou) Co., Ltd. Latest Developments
Table 164. Shen An Micro Co., Ltd. Basic Information, Glucose Monitoring Sensor IC Manufacturing Base, Sales Area and Its Competitors
Table 165. Shen An Micro Co., Ltd. Glucose Monitoring Sensor IC Product Portfolios and Specifications
Table 166. Shen An Micro Co., Ltd. Glucose Monitoring Sensor IC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 167. Shen An Micro Co., Ltd. Main Business
Table 168. Shen An Micro Co., Ltd. Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of Glucose Monitoring Sensor IC
Figure 2. Glucose Monitoring Sensor IC Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global Glucose Monitoring Sensor IC Sales Growth Rate 2021-2032 (Million Units)
Figure 7. Global Glucose Monitoring Sensor IC Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. Glucose Monitoring Sensor IC Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. Glucose Monitoring Sensor IC Sales Market Share by Country/Region (2025)
Figure 10. Glucose Monitoring Sensor IC Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of Standalone Analog Front End IC
Figure 12. Product Picture of MCU with Integrated Sensor AFE
Figure 13. Product Picture of Integrated Sensor SoC
Figure 14. Product Picture of Custom Sensor ASIC
Figure 15. Product Picture of Other
Figure 16. Global Glucose Monitoring Sensor IC Sales Market Share by Type in 2026
Figure 17. Global Glucose Monitoring Sensor IC Revenue Market Share by Type (2021-2026)
Figure 18. Product Picture of Standard Merchant IC
Figure 19. Product Picture of Application-Specific Standard Product
Figure 20. Product Picture of Customer-Specific ASIC
Figure 21. Product Picture of Captive / Internally Developed IC
Figure 22. Product Picture of Other
Figure 23. Global Glucose Monitoring Sensor IC Sales Market Share by Supply Model in 2026
Figure 24. Global Glucose Monitoring Sensor IC Revenue Market Share by Supply Model (2021-2026)
Figure 25. Product Picture of Two-Electrode Configuration
Figure 26. Product Picture of Three-Electrode Configuration
Figure 27. Product Picture of Four-Electrode Configuration
Figure 28. Product Picture of Multi-Electrode Configuration

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Figure 29. Product Picture of Other
Figure 30. Global Glucose Monitoring Sensor IC Sales Market Share by Electrode Configuration in 2026
Figure 31. Global Glucose Monitoring Sensor IC Revenue Market Share by Electrode Configuration (2021-2026)
Figure 32. Product Picture of Single-Channel IC
Figure 33. Product Picture of Dual-Channel IC
Figure 34. Product Picture of Multi-Channel IC
Figure 35. Product Picture of Other
Figure 36. Global Glucose Monitoring Sensor IC Sales Market Share by Number of Sensing Channels in 2026
Figure 37. Global Glucose Monitoring Sensor IC Revenue Market Share by Number of Sensing Channels (2021-2026)
Figure 38. Glucose Monitoring Sensor IC Consumed in Continuous Glucose Monitoring
Figure 39. Global Glucose Monitoring Sensor IC Market: Continuous Glucose Monitoring (2021-2026) & (Million Units)
Figure 40. Glucose Monitoring Sensor IC Consumed in Blood Glucose Metering
Figure 41. Global Glucose Monitoring Sensor IC Market: Blood Glucose Metering (2021-2026) & (Million Units)
Figure 42. Glucose Monitoring Sensor IC Consumed in Professional Glucose Monitoring
Figure 43. Global Glucose Monitoring Sensor IC Market: Professional Glucose Monitoring (2021-2026) & (Million Units)
Figure 44. Glucose Monitoring Sensor IC Consumed in Multi-Analyte Monitoring
Figure 45. Global Glucose Monitoring Sensor IC Market: Multi-Analyte Monitoring (2021-2026) & (Million Units)
Figure 46. Glucose Monitoring Sensor IC Consumed in Other
Figure 47. Global Glucose Monitoring Sensor IC Market: Other (2021-2026) & (Million Units)
Figure 48. Global Glucose Monitoring Sensor IC Sale Market Share by Application (2025)
Figure 49. Global Glucose Monitoring Sensor IC Revenue Market Share by Application in 2025
Figure 50. Glucose Monitoring Sensor IC Sales by Company in 2025 (Million Units)
Figure 51. Global Glucose Monitoring Sensor IC Sales Market Share by Company in 2025
Figure 52. Glucose Monitoring Sensor IC Revenue by Company in 2025 ($ millions)
Figure 53. Global Glucose Monitoring Sensor IC Revenue Market Share by Company in 2025
Figure 54. Global Glucose Monitoring Sensor IC Sales Market Share by Geographic

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Region (2021-2026)
Figure 55. Global Glucose Monitoring Sensor IC Revenue Market Share by Geographic Region in 2025
Figure 56. Americas Glucose Monitoring Sensor IC Sales 2021-2026 (Million Units)
Figure 57. Americas Glucose Monitoring Sensor IC Revenue 2021-2026 ($ millions)
Figure 58. APAC Glucose Monitoring Sensor IC Sales 2021-2026 (Million Units)
Figure 59. APAC Glucose Monitoring Sensor IC Revenue 2021-2026 ($ millions)
Figure 60. Europe Glucose Monitoring Sensor IC Sales 2021-2026 (Million Units)
Figure 61. Europe Glucose Monitoring Sensor IC Revenue 2021-2026 ($ millions)
Figure 62. Middle East & Africa Glucose Monitoring Sensor IC Sales 2021-2026 (Million Units)
Figure 63. Middle East & Africa Glucose Monitoring Sensor IC Revenue 2021-2026 ($ millions)
Figure 64. Americas Glucose Monitoring Sensor IC Sales Market Share by Country in 2025
Figure 65. Americas Glucose Monitoring Sensor IC Revenue Market Share by Country (2021-2026)
Figure 66. Americas Glucose Monitoring Sensor IC Sales Market Share by Type (2021-2026)
Figure 67. Americas Glucose Monitoring Sensor IC Sales Market Share by Application (2021-2026)
Figure 68. United States Glucose Monitoring Sensor IC Revenue Growth 2021-2026 ($ millions)
Figure 69. Canada Glucose Monitoring Sensor IC Revenue Growth 2021-2026 ($ millions)
Figure 70. Mexico Glucose Monitoring Sensor IC Revenue Growth 2021-2026 ($ millions)
Figure 71. Brazil Glucose Monitoring Sensor IC Revenue Growth 2021-2026 ($ millions)
Figure 72. APAC Glucose Monitoring Sensor IC Sales Market Share by Region in 2025
Figure 73. APAC Glucose Monitoring Sensor IC Revenue Market Share by Region (2021-2026)
Figure 74. APAC Glucose Monitoring Sensor IC Sales Market Share by Type (2021-2026)
Figure 75. APAC Glucose Monitoring Sensor IC Sales Market Share by Application (2021-2026)
Figure 76. China Glucose Monitoring Sensor IC Revenue Growth 2021-2026 ($ millions)
Figure 77. Japan Glucose Monitoring Sensor IC Revenue Growth 2021-2026 ($ millions)
Figure 78. South Korea Glucose Monitoring Sensor IC Revenue Growth 2021-2026 ($

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millions)
Figure 79. Southeast Asia Glucose Monitoring Sensor IC Revenue Growth 2021-2026 ($ millions)
Figure 80. India Glucose Monitoring Sensor IC Revenue Growth 2021-2026 ($ millions)
Figure 81. Australia Glucose Monitoring Sensor IC Revenue Growth 2021-2026 ($ millions)
Figure 82. China Taiwan Glucose Monitoring Sensor IC Revenue Growth 2021-2026 ($ millions)
Figure 83. Europe Glucose Monitoring Sensor IC Sales Market Share by Country in 2025
Figure 84. Europe Glucose Monitoring Sensor IC Revenue Market Share by Country (2021-2026)
Figure 85. Europe Glucose Monitoring Sensor IC Sales Market Share by Type (2021-2026)
Figure 86. Europe Glucose Monitoring Sensor IC Sales Market Share by Application (2021-2026)
Figure 87. Germany Glucose Monitoring Sensor IC Revenue Growth 2021-2026 ($ millions)
Figure 88. France Glucose Monitoring Sensor IC Revenue Growth 2021-2026 ($ millions)
Figure 89. UK Glucose Monitoring Sensor IC Revenue Growth 2021-2026 ($ millions)
Figure 90. Italy Glucose Monitoring Sensor IC Revenue Growth 2021-2026 ($ millions)
Figure 91. Russia Glucose Monitoring Sensor IC Revenue Growth 2021-2026 ($ millions)
Figure 92. Middle East & Africa Glucose Monitoring Sensor IC Sales Market Share by Country (2021-2026)
Figure 93. Middle East & Africa Glucose Monitoring Sensor IC Sales Market Share by Type (2021-2026)
Figure 94. Middle East & Africa Glucose Monitoring Sensor IC Sales Market Share by Application (2021-2026)
Figure 95. Egypt Glucose Monitoring Sensor IC Revenue Growth 2021-2026 ($ millions)
Figure 96. South Africa Glucose Monitoring Sensor IC Revenue Growth 2021-2026 ($ millions)
Figure 97. Israel Glucose Monitoring Sensor IC Revenue Growth 2021-2026 ($ millions)
Figure 98. Turkey Glucose Monitoring Sensor IC Revenue Growth 2021-2026 ($ millions)
Figure 99. GCC Countries Glucose Monitoring Sensor IC Revenue Growth 2021-2026 ($ millions)
Figure 100. Manufacturing Cost Structure Analysis of Glucose Monitoring Sensor IC in

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2026
Figure 101. Manufacturing Process Analysis of Glucose Monitoring Sensor IC
Figure 102. Industry Chain Structure of Glucose Monitoring Sensor IC
Figure 103. Channels of Distribution
Figure 104. Global Glucose Monitoring Sensor IC Sales Market Forecast by Region (2027-2032)
Figure 105. Global Glucose Monitoring Sensor IC Revenue Market Share Forecast by Region (2027-2032)
Figure 106. Global Glucose Monitoring Sensor IC Sales Market Share Forecast by Type (2027-2032)
Figure 107. Global Glucose Monitoring Sensor IC Revenue Market Share Forecast by Type (2027-2032)
Figure 108. Global Glucose Monitoring Sensor IC Sales Market Share Forecast by Application (2027-2032)
Figure 109. Global Glucose Monitoring Sensor IC Revenue Market Share Forecast by Application (2027-2032)

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