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Global Industrial Digital Input IC Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Industrial Digital Input IC market size is predicted to grow from US$ 303 million in 2025 to US$ 542 million in 2032; it is expected to grow at a CAGR of 8.7% from 2026 to 2032.

Industrial Digital Input ICs are dedicated semiconductor devices designed for the digital-input front end of industrial automation and control equipment. They receive binary signals from industrial field devices such as proximity sensors, mechanical switches, pushbuttons and limit switches, and convert 24 V-class or other industrial-voltage inputs into logic-level signals that can be processed by PLC controllers, MCUs or bus ASICs. Typical devices integrate input-current limiting, threshold detection, protection, filtering and signal translation, while higher-integration products may additionally incorporate galvanic isolation, SPI or parallel interfaces, wire-break diagnostics, field-supply monitoring and CRC functions.

Key Findings

Industrial digital input ICs are increasingly replacing discrete front-end implementations in space-constrained high-channel-density industrial I/O designs

Integrated isolated products combine signal conditioning and galvanic isolation, increasing functional integration and reducing external component requirements

Eight-channel architectures have become an important design direction for compact PLC and distributed I/O modules

IEC 61131-2 Type 1, Type 2 and Type 3 compatibility remains a core product

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requirement across major suppliers

Diagnostics, configurable current limiting, source/sink flexibility and serial interfaces are becoming important differentiation factors

Market Trends

Industrial Digital Input IC development is moving toward higher channel density, deeper integration and lower system power consumption. Traditional PLC and industrial I/O designs frequently used combinations of resistors, comparators, optocouplers and isolation components to condition 24 V field inputs. Newer ICs increasingly integrate current limiting, threshold detection, filtering, diagnostics and communication interfaces within a single device, while integrated isolated architectures further combine the signal-conditioning and isolation stages. Eight-channel designs are particularly relevant because they enable substantial PCB-area reduction in high-density digital input cards. Analog Devices' MAX22190 integrates eight IEC 61131-2-compatible inputs, serialization and diagnostics, while Infineon's ISOFACE family combines eight-channel digital input functionality with galvanic isolation and diagnostic features. Texas Instruments' ISO1228 similarly integrates eight isolated channels, selectable current limiting, source/sink configuration, SPI or parallel outputs and fault monitoring. The direction of innovation is therefore shifting from standalone input protection toward complete, configurable digital-input front ends optimized for compact, thermally efficient and increasingly diagnostic industrial control platforms.

Market Dynamics

Drivers

The primary driver is the continued growth in digital input density across PLCs, distributed I/O, machine controllers and industrial automation platforms. Modern production equipment contains increasing numbers of proximity sensors, switches, safety-related signals and other discrete field devices, creating demand for compact front-end circuits capable of reliably converting industrial-voltage signals into controller-compatible logic. At the same time, manufacturers of I/O modules are under pressure to reduce PCB footprint, heat dissipation and component count. Dedicated digital input ICs address these requirements by integrating functions that historically required several discrete components. Infineon states that its integrated digital input architecture can provide substantially higher channel density than alternative implementations, while ST positions CLT01 specifically around reduced power dissipation and increased I/O

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module density. These design economics make specialized ICs particularly attractive for multi-channel PLC cards and remote I/O products.

Restraints

The market remains constrained by the long lifecycle and conservative qualification practices of industrial control equipment. PLC and DCS suppliers typically maintain platforms for many years, making redesign decisions slower than in consumer electronics. Some digital input circuits can also still be implemented economically with optocouplers, comparators, discrete protection and isolation components, particularly in low-channel-count or cost-sensitive designs. Different IEC 61131-2 input classes, source/sink configurations, field-voltage requirements, isolation strategies and diagnostic needs make it difficult for a single IC architecture to address every application. Integrated isolated devices additionally carry higher semiconductor content and qualification complexity than non-isolated products, while customers may prefer externally separated isolation where channel-to-channel isolation, safety architecture or PCB partitioning requirements dictate a different system design.

Opportunities

The strongest opportunity is the migration of higher-channel-count industrial I/O toward integrated front-end architectures. Remote I/O, decentralized machine control and compact PLC platforms require greater channel density while facing tighter PCB-space and thermal constraints, creating favorable conditions for octal and other highly integrated ICs. Integrated isolation offers further value by reducing the number of optocouplers or discrete isolators and simplifying isolation-barrier design. Configurable products that support IEC 61131-2 Type 1, Type 2 and Type 3 characteristics can serve a broader range of industrial input modules and reduce the number of different ICs required by equipment manufacturers. Source/sink configurability also expands addressable applications. TI’s ISO1228, for example, supports both sinking and sourcing digital inputs and incorporates current limiting, diagnostics and multiple controller interface options, illustrating the opportunity for multifunctional devices that reduce overall system-level component count.

Challenges

Long-term competition requires suppliers to balance integration with robustness, thermal performance and industrial qualification. Digital input ICs interface directly with noisy factory-floor wiring and must withstand ESD, surge, reverse polarity, supply disturbances and electromagnetic interference while maintaining predictable input

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thresholds. Higher integration places more channels and functionality into smaller packages, increasing thermal-design and fault-management requirements. Integrated isolated devices additionally need reliable isolation-barrier performance and relevant safety certifications. Product suppliers must also maintain compatibility with long industrial equipment lifecycles and guarantee stable supply. As diagnostic functions become more sophisticated, firmware and MCU-interface compatibility gain importance, but excessive feature complexity can raise product cost for applications requiring only basic input conditioning.

Industry Chain Analysis

The upstream industry chain consists of semiconductor wafers, analog and mixed-signal process technologies, isolation technologies, packaging materials, lead frames or substrates, and wafer fabrication and semiconductor assembly/testing services. At the IC design level, the core technical capabilities include high-voltage industrial input structures, accurate current limiting, comparator and threshold circuits, surge and ESD protection, galvanic isolation where applicable, digital filtering, SPI or parallel interface logic and embedded diagnostic functions. Non-isolated devices generally concentrate value in signal conditioning, current control, protection and serialization, whereas integrated isolated devices add isolation structures and associated certification requirements, resulting in higher integration and generally higher device value.

Midstream suppliers design, manufacture or outsource production of finished Industrial Digital Input ICs and deliver them to PLC, remote I/O, DCS and industrial-control manufacturers. Downstream equipment manufacturers integrate these ICs with MCUs, communication processors, connectors, power supplies and PCB assemblies to produce complete digital input cards and control modules. Value creation increasingly comes from reducing external BOM, PCB area, power dissipation and engineering effort while improving input diagnostics and reliability. The target market therefore occupies a clearly defined semiconductor layer upstream of complete industrial I/O equipment and should be measured independently from downstream module and controller revenues.

Segment Insights

Non-Isolated Industrial Digital Input ICs provide field-input conditioning, current limiting, protection, threshold detection and logic conversion while allowing equipment designers to implement galvanic isolation separately where required. This architecture retains flexibility for systems using discrete digital isolators, optocouplers or application-specific isolation arrangements and remains relevant where equipment manufacturers have

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established isolation architectures. ST's CLT01 family illustrates the high-integration non-isolated approach by combining eight current-sinking industrial inputs, accurate current limitation and serialization while supporting IEC 61131-2 Type 1, Type 2 and Type 3 configurations. The product remains in volume production, indicating continued commercial relevance for this architecture.

Integrated Isolated products represent the higher-functionality segment by incorporating galvanic isolation directly into the digital-input IC. This can reduce PCB area, external isolation components and engineering complexity, particularly in dense multi-channel designs. Current products from Infineon, Texas Instruments, Shanghai Chipanalog Microelectronics and Suzhou Novosense demonstrate increasing adoption of eight-channel isolated architectures supporting IEC 61131-2 input characteristics. Additional features such as wire-break detection, supply monitoring, programmable filtering, source/sink capability and SPI communication further increase product differentiation.

Downstream Market Opportunities

Programmable Logic Controller digital input modules remain a central application because dedicated digital input ICs directly address the conversion of factory-floor 24 V discrete signals into controller-side logic. Remote and distributed I/O modules offer additional opportunity as decentralized automation architectures require compact, thermally efficient multi-channel input designs. DCS I/O cards similarly benefit from reliability, diagnostic capability and galvanic isolation, while industrial machinery, robot controllers, motor drives and motion-control equipment create demand for robust digital inputs positioned close to machine-control electronics. Across these applications, the commercial opportunity is strongest where customers need higher channel density, smaller PCB area, lower thermal dissipation and more comprehensive field diagnostics rather than simply the lowest component cost.

Regional Insights

North America and Europe have strong positions in the supply of specialized industrial analog and mixed-signal semiconductors. Analog Devices and Texas Instruments provide established U.S.-based industrial interface portfolios, while Infineon Technologies and STMicroelectronics represent major European suppliers with dedicated industrial digital-input products. These regions benefit from mature PLC, process-control, robotics and industrial-equipment ecosystems that support long product lifecycles and demand for highly qualified industrial ICs.

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China has become increasingly relevant in the supply of locally developed integrated isolated digital-input devices. Shanghai Chipanalog Microelectronics offers the CA-IS398x series of eight-channel isolated 24 V digital-input ICs, while Suzhou Novosense Microelectronics provides the NSI8608 multi-channel isolated digital-input receiver supporting IEC 61131-2 Type 1, Type 2 and Type 3 characteristics. This development expands domestic sourcing options for Chinese industrial automation equipment manufacturers and increases competition in high-integration isolated-interface products. Japan remains an important industrial automation and semiconductor market, although under the strict definition used in this study, the confirmed major supplier base is more concentrated in the United States, Europe and China.

Competitive Landscape Analysis

The Industrial Digital Input IC market has a relatively focused supplier structure because products require a combination of high-voltage analog front-end expertise, industrial protection, mixed-signal integration and long-term qualification. Analog Devices, Inc., Texas Instruments Incorporated, Infineon Technologies AG and STMicroelectronics N.V. form the established international supplier group, while Shanghai Chipanalog Microelectronics Co., Ltd. and Suzhou Novosense Microelectronics Co., Ltd. represent the confirmed Chinese participants in the defined market. Competition is increasingly moving beyond basic input conversion toward channel density, integrated isolation, power dissipation, diagnostic depth and configuration flexibility. Analog Devices' MAX22190 emphasizes an eight-channel architecture with diagnostics and configurable IEC 61131-2 inputs; Infineon's ISOFACE platform combines eight digital inputs with integrated isolation and wire-break and supply diagnostics; TI's ISO1228 integrates eight isolated inputs, source/sink configurability and serial or parallel control-side interfaces; ST continues volume production of the CLT01 octal digital-input platform. Chinese suppliers are competing particularly in integrated isolated architectures: Chipanalog's CA-IS398x provides eight channels, integrated capacitive isolation and Type 1/2/3 compatibility, while Novosense's NSI8608 integrates isolation and current limiting for 24–60 V digital inputs. Future competitive differentiation is expected to center on reducing system BOM and thermal load while increasing channel density, diagnostic coverage, isolation performance and flexibility across PLC and distributed-I/O platforms.

Report Scope

LPI (LP Information)' newest research report, the "Industrial Digital Input IC Industry Forecast" looks at past sales and reviews total world Industrial Digital Input IC sales in 2025, providing a comprehensive analysis by region and market sector of projected

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Industrial Digital Input IC sales for 2026 through 2032. With Industrial Digital Input IC sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Industrial Digital Input IC industry.

This Insight Report provides a comprehensive analysis of the global Industrial Digital Input 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 analyses the strategies of leading global companies with a focus on Industrial Digital Input IC portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Industrial Digital Input IC market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Industrial Digital Input IC and breaks down the forecast by Isolation Architecture Types, 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 Industrial Digital Input IC.

This report presents a comprehensive overview, market shares, and growth opportunities of Industrial Digital Input IC market by product type, application, key players and key regions and countries.

Market Segmentation

Segmentation by Isolation Architecture Types:

Non-Isolated

Integrated Isolated

Segmentation by Input Channel Count Types:

Low-Channel-Count ICs (1–2 Channels)

Medium-Channel-Count ICs (3–4 Channels)

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High-Channel-Count ICs (?5 Channels)

Segmentation by Field Input Polarity Types:

Current-Sinking Input ICs

Current-Sourcing Input ICs

Configurable Sink/Source Input ICs

Segmentation by Application:

Programmable Logic Controller Digital Input Modules

Remote and Distributed I/O Modules

Distributed Control System I/O Cards

Industrial Machinery and Robot Controllers

Motor Drives and Motion Control Equipment

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

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- Brazil

APAC

- China
- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel
- Turkey
- GCC Countries

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The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

Analog Devices, Inc.

Texas Instruments Incorporated

Infineon Technologies AG

STMicroelectronics N.V.

Shanghai Chipanalog Microelectronics Co., Ltd.

Suzhou Novosense Microelectronics Co., Ltd.

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