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Global LiDAR Receiver ASIC Market Growth 2026-2032

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Abstracts

The global LiDAR Receiver ASIC market size is predicted to grow from US$ 501 million in 2025 to US$ 1633 million in 2032; it is expected to grow at a CAGR of 17.9% from 2026 to 2032.

The LiDAR Receiver ASIC market covers application-specific integrated circuits designed to detect, condition, acquire, time, digitize, and process optical return signals within LiDAR receive chains. The research scope focuses on dedicated analog front-end ASICs, transimpedance amplifiers, multi-channel data-acquisition ICs, SPAD- and SiPM-based receiver chips, integrated dToF receiver SoCs, ToF image sensors used in LiDAR architectures, and coherent receiver ASICs for FMCW systems. Depending on the product architecture, these devices may integrate photodetector interfaces, gain control, ambient-light cancellation, overload recovery, analog-to-digital conversion, time-to-digital conversion, photon-event counting, histogram processing, distance calculation, Doppler processing, and preliminary point-level processing. Key performance indicators include input-referred noise, bandwidth, dynamic range, timing resolution, photon-detection efficiency, channel density, crosstalk, ambient-light tolerance, power consumption, operating temperature, and functional-safety capability. LiDAR Receiver ASIC products are primarily used in automotive perception, mobile robotics, industrial automation, precision ranging, spatial mapping, intelligent infrastructure, security monitoring, and specialized sensing systems.

Key Findings

The validated Core Formal List comprises 22 LiDAR Receiver ASIC producers

Integrated dToF receiver SoCs and ToF imagers represent approximately half of modeled product value

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Two leading China-based suppliers shipped more than 2.53 million LiDAR units in 2025

Asia accounted for 74% of new industrial robot installations in 2024

Technology development centers on stacked SPAD, multi-channel acquisition, and coherent FMCW integration

Market Trends

The LiDAR Receiver ASIC industry is moving from discrete receive chains toward more highly integrated and digitally controlled architectures. Conventional photodiode or APD receivers continue to use dedicated transimpedance amplifiers where high bandwidth, wide dynamic range, and rapid overload recovery are required, while multi-channel acquisition ICs increasingly combine analog conditioning, conversion, timing, and preliminary echo processing. In parallel, stacked SPAD architectures are separating the photon-detection layer from advanced logic, allowing manufacturers to increase pixel density, timing capability, and on-chip processing without relying on a single process node for every function. Receiver SoCs are also moving closer to direct distance, intensity, or velocity output, reducing external FPGA requirements and simplifying system calibration. FMCW products remain a smaller technology segment but are advancing through coherent detection ASICs and photonic-electronic integration that support simultaneous distance and radial-velocity measurement. These changes are shifting product differentiation toward system-level power efficiency, interference resistance, functional safety, manufacturability, and the quality of detector–ASIC–algorithm co-optimization rather than individual component specifications alone.

Market Dynamics

Drivers

Demand is being supported by the expansion of automotive perception, mobile robotics, automated material handling, industrial inspection, and intelligent infrastructure. Higher LiDAR shipment volumes increase demand for lower-power, higher-channel-count receiver ASICs capable of operating under strong ambient light and wide temperature ranges. Robotics is becoming particularly important because navigation and obstacle-avoidance systems require compact sensors with continuous spatial awareness, while cost-sensitive autonomous platforms favor integrated receiver SoCs that reduce

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external components. The International Federation of Robotics reported 542,000 industrial robot installations in 2024, with annual installations remaining above 500,000 for four consecutive years. Company disclosures also indicate rapid LiDAR shipment growth in robotics and automotive applications, strengthening the commercial case for dedicated receiver silicon and captive ASIC development.

Restraints

The market remains constrained by demanding performance requirements, long automotive qualification cycles, and significant design and manufacturing complexity. Receiver circuits must detect weak optical returns while recovering quickly from high-intensity reflections, direct sunlight, crosstalk, and electrical interference. Integrated SPAD products require control of dark-count rate, photon-detection efficiency, dead time, pixel uniformity, and optical or electrical crosstalk, while 3D-stacked products add bonding, thermal, test, and yield-management requirements. In long-range and coherent architectures, detector cost, high-speed conversion, precision timing, packaging, and signal-processing workloads can materially increase system cost. Price pressure from LiDAR system manufacturers also limits the ability of ASIC suppliers to pass through development expenses, particularly where annual volumes remain uncertain.

Opportunities

The most attractive opportunities are associated with higher integration, larger receiver arrays, application-specific digital processing, and the transition from evaluation projects to repeatable platform deployments. Stacked SPAD receiver SoCs can address near-field automotive sensing, compact solid-state LiDAR, robotics, and high-resolution depth imaging, while programmable multi-channel acquisition ASICs allow manufacturers to serve several detector configurations through a common platform. Coherent FMCW receiver ASICs offer an additional opportunity where direct velocity measurement, interference resistance, and longer-range performance justify greater optical and processing complexity. There is also room for regional suppliers to replace imported analog front ends and receiver SoCs through lower-cost designs, local technical support, and closer cooperation with LiDAR system manufacturers. New opportunities will increasingly depend on qualified reference designs and scalable manufacturing rather than the availability of standalone prototype chips.

Challenges

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Long-term challenges include fragmented technical architectures, limited standardization, rapid product-generation changes, and the difficulty of translating design wins into stable high-volume revenue. APD, SiPM, monolithic SPAD, stacked SPAD, hybrid photonic-electronic, and FMCW receivers require different processes and supply chains, reducing the transferability of investments across product families. Captive ASIC development by major LiDAR system manufacturers may narrow the addressable market for merchant suppliers, while simultaneously raising the performance benchmark for independent chip companies. Qualification failures, wafer-yield volatility, packaging limitations, customer concentration, and delayed vehicle programs can materially affect revenue visibility. The industry must also manage substitution risks from improved imaging radar, cameras, and sensor-fusion architectures, particularly in applications where LiDAR performance does not justify its incremental system cost.

Industry Chain Analysis

The upstream LiDAR Receiver ASIC supply chain comprises semiconductor process technologies, detector materials, silicon and compound-semiconductor wafers, SPAD and CMOS image-sensor processes, analog and mixed-signal intellectual property, high-speed data converters, silicon photonics, advanced packaging materials, and electronic-design automation. Product architecture determines the upstream dependency: external-detector analog front ends rely heavily on low-noise mixed-signal processes, integrated dToF chips require optimized SPAD and timing technologies, and FMCW receivers depend more strongly on high-speed conversion, coherent photonics, and precision packaging. Foundry availability, process maturity, photodetector performance, mask and engineering costs, and packaging yield collectively influence unit economics.

The midstream includes integrated device manufacturers, fabless receiver-chip designers, custom-ASIC providers, and LiDAR system manufacturers developing captive silicon. Value is created through detector-interface design, noise and dynamic-range optimization, time measurement, photon-event processing, calibration, safety mechanisms, and the conversion of raw return signals into usable distance or velocity data. Downstream value is realized through integration into optical engines, LiDAR modules, perception systems, robots, vehicles, industrial equipment, and mapping platforms. Gross-margin potential is generally higher for differentiated high-performance ASICs and qualified automotive products, but substantial research, mask, packaging, validation, and customer-support costs mean profitability depends strongly on reusable platforms and sustained production volumes.

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Segment Insights

By product type, integrated dToF receiver SoCs and ToF imagers form the largest modeled value segment, representing approximately half of the current product value pool. Their position reflects the ability to combine photon detection, timing, histogram processing, ambient-light suppression, and ranging functions in a compact semiconductor platform. Analog front-end and data-acquisition ASICs remain a substantial segment, particularly in long-range pulsed systems where customers require flexibility in detector selection and receiver-channel design. Captive ASICs used by LiDAR system manufacturers also account for a meaningful share of industry value, although these devices are generally not sold as independent merchant products.

By receiver principle, direct time-of-flight remains the commercially dominant architecture, covering both linear-mode APD receivers and digital SPAD-based solutions. Stacked SPAD and area-array receivers are among the fastest-developing product directions because they support higher channel density and deeper on-chip processing. Coherent FMCW receivers currently represent a smaller share but provide differentiated opportunities in direct velocity measurement and interference-resistant sensing. By integration structure, the market is progressing from external-detector interfaces toward monolithic, 3D-stacked, hybrid-packaged, and photonic-electronic solutions, with each approach balancing sensitivity, cost, yield, flexibility, and processing capability.

Downstream Market Opportunities

Automotive perception remains an important opportunity because higher levels of driving assistance require reliable long-range detection, near-field blind-zone coverage, and improved operation under complex lighting conditions. Robotics is developing into a broader volume market as autonomous mobile robots, delivery platforms, robotic lawn mowers, humanoid systems, and industrial vehicles require compact and cost-efficient spatial sensing. Industrial measurement, warehouse automation, infrastructure monitoring, security, and three-dimensional mapping provide additional demand with different performance and qualification requirements. The strongest commercial opportunities are expected where receiver ASIC integration reduces optical alignment, external processing, power consumption, calibration complexity, or overall sensor cost rather than merely improving a single chip specification.

Regional Insights

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Asia-Pacific represents the leading regional center for LiDAR Receiver ASIC manufacturing activity, system production, and emerging volume applications. Japan maintains strengths in stacked SPAD sensors, automotive semiconductor quality systems, and multi-channel acquisition technology, while China has developed a broad group of SPAD receiver-chip companies and LiDAR manufacturers using proprietary ASICs. China-based suppliers reported more than 2.53 million combined LiDAR shipments in 2025 across two leading companies, demonstrating the scale at which captive and locally sourced receiver silicon can be absorbed. The region also benefits from a large electronics manufacturing base and its dominant share of global industrial robot deployment.

North America has a comparatively strong position in high-performance analog front ends, custom ASIC design, digital LiDAR SoCs, silicon photonics, and coherent FMCW receivers. Europe is differentiated by automotive-grade analog and mixed-signal capabilities, functional-safety expertise, and integrated ToF sensing. Israel and South Korea have smaller supplier pools but maintain specialized positions in CMOS eTOF and SPAD receiver SoCs. Regional competition is increasingly influenced by local supply-chain security, access to qualified foundries and advanced packaging, customer engineering support, and the ability to complete automotive or industrial qualification close to end users.

Competitive Landscape Analysis

The LiDAR Receiver ASIC competitive landscape is fragmented by product architecture and commercial model rather than controlled by a single class of supplier. The confirmed Core Formal List contains 22 producers, including large diversified semiconductor companies, specialized fabless receiver-chip vendors, custom-ASIC providers, and LiDAR system manufacturers with captive silicon. Large semiconductor companies compete through process maturity, automotive qualification, broad analog portfolios, long-term supply capability, and established sales channels. Specialist companies differentiate through SPAD arrays, 3D stacking, high-channel-count timing circuits, SiPM readout, coherent detection, or photonic-electronic integration. Captive ASIC developers use vertical integration to optimize detector selection, signal processing, power, optical architecture, and system cost, but their chips are generally unavailable to external customers. Competitive advantage is therefore determined by verified product performance, manufacturing yield, qualification status, customer design wins, reusable architectures, and the ability to support sustained production rather than company size alone. Future consolidation may occur through technology acquisitions, licensing, and closer cooperation between detector, ASIC, photonics, and LiDAR

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system companies, while low-confidence prototype and IP-only providers remain outside the core commercial supplier group.

Report Scope

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for LiDAR Receiver ASIC 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 LiDAR Receiver ASIC.

This report presents a comprehensive overview, market shares, and growth opportunities of LiDAR Receiver ASIC market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Analog Front-End ASIC

Data Acquisition ASIC

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Other

Segmentation by Receiver Principle:

Linear-Mode Receiver

Photon-Counting Receiver

Coherent Receiver

Other Receiver Principle

Segmentation by Detector Integration:

External Detector Interface

Monolithic Integration

3D-Stacked Integration

Photonic-Electronic Integration

Other

Segmentation by Channel Configuration:

Single-Channel Receiver

Multi-Channel Receiver

Other Channel Configuration

Segmentation by Application:

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Navigation and Obstacle Avoidance

Precision Ranging and Metrology

Mapping and Spatial Reconstruction

Motion and Velocity Measurement

Monitoring and Intrusion Detection

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

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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.

Sony Group Corporation

Texas Instruments Incorporated

Infineon Technologies AG

Analog Devices, Inc.

Renesas Electronics Corporation

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MACOM Technology Solutions Holdings, Inc.

Melexis N.V.

Elmos Semiconductor SE

Hesai Group

RoboSense Technology Co., Ltd

indie Semiconductor, Inc.

Ouster, Inc.

Maxic Technology, Inc.

Innoviz Technologies Ltd.

Aeva Technologies, Inc.

SiLC Technologies, Inc.

FortSense

Adaps Photonics

Siliconroad Semiconductor Co., Ltd.

Newsight Imaging Ltd.

SOLiDVUE, Inc.

Weeroc

Key Questions Addressed in this Report

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What is the 10-year outlook for the global LiDAR Receiver ASIC market?

What factors are driving LiDAR Receiver ASIC market growth, globally and by region?

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

How do LiDAR Receiver ASIC market opportunities vary by end market size?

How does LiDAR Receiver ASIC 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 LiDAR Receiver ASIC Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for LiDAR Receiver ASIC by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for LiDAR Receiver ASIC by Country/Region, 2021, 2025 & 2032
2.2 LiDAR Receiver ASIC Segment by Type
  2.2.1 Analog Front-End ASIC
  2.2.2 Data Acquisition ASIC
  2.2.3 Other
  2.2.4 LiDAR Receiver ASIC Sales by Type
    2.2.4.1 Global LiDAR Receiver ASIC Sales Market Share by Type (2021-2026)
    2.2.4.2 Global LiDAR Receiver ASIC Revenue and Market Share by Type (2021-2026)
    2.2.4.3 Global LiDAR Receiver ASIC Sale Price by Type (2021-2026)
2.3 LiDAR Receiver ASIC Segment by Receiver Principle
  2.3.1 Linear-Mode Receiver
  2.3.2 Photon-Counting Receiver
  2.3.3 Coherent Receiver
  2.3.4 Other Receiver Principle
  2.3.5 LiDAR Receiver ASIC Sales by Receiver Principle
    2.3.5.1 Global LiDAR Receiver ASIC Sales Market Share by Receiver Principle (2021-2026)
    2.3.5.2 Global LiDAR Receiver ASIC Revenue and Market Share by Receiver

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Principle (2021-2026)
2.3.5.3 Global LiDAR Receiver ASIC Sale Price by Receiver Principle (2021-2026)
2.4 LiDAR Receiver ASIC Segment by Detector Integration
2.4.1 External Detector Interface
2.4.2 Monolithic Integration
2.4.3 3D-Stacked Integration
2.4.4 Photonic-Electronic Integration
2.4.5 Other
2.4.6 LiDAR Receiver ASIC Sales by Detector Integration
2.4.6.1 Global LiDAR Receiver ASIC Sales Market Share by Detector Integration (2021-2026)
2.4.6.2 Global LiDAR Receiver ASIC Revenue and Market Share by Detector Integration (2021-2026)
2.4.6.3 Global LiDAR Receiver ASIC Sale Price by Detector Integration (2021-2026)
2.5 LiDAR Receiver ASIC Segment by Channel Configuration
2.5.1 Single-Channel Receiver
2.5.2 Multi-Channel Receiver
2.5.3 Other Channel Configuration
2.5.4 LiDAR Receiver ASIC Sales by Channel Configuration
2.5.4.1 Global LiDAR Receiver ASIC Sales Market Share by Channel Configuration (2021-2026)
2.5.4.2 Global LiDAR Receiver ASIC Revenue and Market Share by Channel Configuration (2021-2026)
2.5.4.3 Global LiDAR Receiver ASIC Sale Price by Channel Configuration (2021-2026)
2.6 LiDAR Receiver ASIC Segment by Application
2.6.1 Navigation and Obstacle Avoidance
2.6.2 Precision Ranging and Metrology
2.6.3 Mapping and Spatial Reconstruction
2.6.4 Motion and Velocity Measurement
2.6.5 Monitoring and Intrusion Detection
2.6.6 Other
2.6.7 LiDAR Receiver ASIC Sales by Application
2.6.7.1 Global LiDAR Receiver ASIC Sale Market Share by Application (2021-2026)
2.6.7.2 Global LiDAR Receiver ASIC Revenue and Market Share by Application (2021-2026)
2.6.7.3 Global LiDAR Receiver ASIC Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

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3.1 Global LiDAR Receiver ASIC Breakdown Data by Company
3.1.1 Global LiDAR Receiver ASIC Annual Sales by Company (2021-2026)
3.1.2 Global LiDAR Receiver ASIC Sales Market Share by Company (2021-2026)
3.2 Global LiDAR Receiver ASIC Annual Revenue by Company (2021-2026)
3.2.1 Global LiDAR Receiver ASIC Revenue by Company (2021-2026)
3.2.2 Global LiDAR Receiver ASIC Revenue Market Share by Company (2021-2026)
3.3 Global LiDAR Receiver ASIC Sale Price by Company
3.4 Key Manufacturers LiDAR Receiver ASIC Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers LiDAR Receiver ASIC Product Location Distribution
3.4.2 Players LiDAR Receiver ASIC 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 LIDAR RECEIVER ASIC BY GEOGRAPHIC REGION

4.1 World Historic LiDAR Receiver ASIC Market Size by Geographic Region (2021-2026)
4.1.1 Global LiDAR Receiver ASIC Annual Sales by Geographic Region (2021-2026)
4.1.2 Global LiDAR Receiver ASIC Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic LiDAR Receiver ASIC Market Size by Country/Region (2021-2026)
4.2.1 Global LiDAR Receiver ASIC Annual Sales by Country/Region (2021-2026)
4.2.2 Global LiDAR Receiver ASIC Annual Revenue by Country/Region (2021-2026)
4.3 Americas LiDAR Receiver ASIC Sales Growth
4.4 APAC LiDAR Receiver ASIC Sales Growth
4.5 Europe LiDAR Receiver ASIC Sales Growth
4.6 Middle East & Africa LiDAR Receiver ASIC Sales Growth

5 AMERICAS

5.1 Americas LiDAR Receiver ASIC Sales by Country
5.1.1 Americas LiDAR Receiver ASIC Sales by Country (2021-2026)
5.1.2 Americas LiDAR Receiver ASIC Revenue by Country (2021-2026)

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info@marketpublishers.com

5.2 Americas LiDAR Receiver ASIC Sales by Type (2021-2026)
5.3 Americas LiDAR Receiver ASIC Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC LiDAR Receiver ASIC Sales by Region
  6.1.1 APAC LiDAR Receiver ASIC Sales by Region (2021-2026)
  6.1.2 APAC LiDAR Receiver ASIC Revenue by Region (2021-2026)
6.2 APAC LiDAR Receiver ASIC Sales by Type (2021-2026)
6.3 APAC LiDAR Receiver ASIC 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 LiDAR Receiver ASIC by Country
  7.1.1 Europe LiDAR Receiver ASIC Sales by Country (2021-2026)
  7.1.2 Europe LiDAR Receiver ASIC Revenue by Country (2021-2026)
7.2 Europe LiDAR Receiver ASIC Sales by Type (2021-2026)
7.3 Europe LiDAR Receiver ASIC 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 LiDAR Receiver ASIC by Country
  8.1.1 Middle East & Africa LiDAR Receiver ASIC Sales by Country (2021-2026)

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8.1.2 Middle East & Africa LiDAR Receiver ASIC Revenue by Country (2021-2026)
8.2 Middle East & Africa LiDAR Receiver ASIC Sales by Type (2021-2026)
8.3 Middle East & Africa LiDAR Receiver ASIC 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 LiDAR Receiver ASIC
10.3 Manufacturing Process Analysis of LiDAR Receiver ASIC
10.4 Industry Chain Structure of LiDAR Receiver ASIC

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
11.1.1 Direct Channels
11.1.2 Indirect Channels
11.2 LiDAR Receiver ASIC Distributors
11.3 LiDAR Receiver ASIC Customer

12 WORLD FORECAST REVIEW FOR LIDAR RECEIVER ASIC BY GEOGRAPHIC REGION

12.1 Global LiDAR Receiver ASIC Market Size Forecast by Region
12.1.1 Global LiDAR Receiver ASIC Forecast by Region (2027-2032)
12.1.2 Global LiDAR Receiver ASIC 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)

+357 96 030922
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12.5 Middle East & Africa Forecast by Country (2027-2032)
12.6 Global LiDAR Receiver ASIC Forecast by Type (2027-2032)
12.7 Global LiDAR Receiver ASIC Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Sony Group Corporation
  13.1.1 Sony Group Corporation Company Information
  13.1.2 Sony Group Corporation LiDAR Receiver ASIC Product Portfolios and Specifications
  13.1.3 Sony Group Corporation LiDAR Receiver ASIC Sales, Revenue, Price and Gross Margin (2021-2026)
  13.1.4 Sony Group Corporation Main Business Overview
  13.1.5 Sony Group Corporation Latest Developments
13.2 Texas Instruments Incorporated
  13.2.1 Texas Instruments Incorporated Company Information
  13.2.2 Texas Instruments Incorporated LiDAR Receiver ASIC Product Portfolios and Specifications
  13.2.3 Texas Instruments Incorporated LiDAR Receiver ASIC 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 Infineon Technologies AG
  13.3.1 Infineon Technologies AG Company Information
  13.3.2 Infineon Technologies AG LiDAR Receiver ASIC Product Portfolios and Specifications
  13.3.3 Infineon Technologies AG LiDAR Receiver ASIC Sales, Revenue, Price and Gross Margin (2021-2026)
  13.3.4 Infineon Technologies AG Main Business Overview
  13.3.5 Infineon Technologies AG Latest Developments
13.4 Analog Devices, Inc.
  13.4.1 Analog Devices, Inc. Company Information
  13.4.2 Analog Devices, Inc. LiDAR Receiver ASIC Product Portfolios and Specifications
  13.4.3 Analog Devices, Inc. LiDAR Receiver ASIC 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

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info@marketpublishers.com

13.5.1 Renesas Electronics Corporation Company Information
13.5.2 Renesas Electronics Corporation LiDAR Receiver ASIC Product Portfolios and Specifications
13.5.3 Renesas Electronics Corporation LiDAR Receiver ASIC 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 MACOM Technology Solutions Holdings, Inc.
13.6.1 MACOM Technology Solutions Holdings, Inc. Company Information
13.6.2 MACOM Technology Solutions Holdings, Inc. LiDAR Receiver ASIC Product Portfolios and Specifications
13.6.3 MACOM Technology Solutions Holdings, Inc. LiDAR Receiver ASIC Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 MACOM Technology Solutions Holdings, Inc. Main Business Overview
13.6.5 MACOM Technology Solutions Holdings, Inc. Latest Developments
13.7 Melexis N.V.
13.7.1 Melexis N.V. Company Information
13.7.2 Melexis N.V. LiDAR Receiver ASIC Product Portfolios and Specifications
13.7.3 Melexis N.V. LiDAR Receiver ASIC Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 Melexis N.V. Main Business Overview
13.7.5 Melexis N.V. Latest Developments
13.8 Elmos Semiconductor SE
13.8.1 Elmos Semiconductor SE Company Information
13.8.2 Elmos Semiconductor SE LiDAR Receiver ASIC Product Portfolios and Specifications
13.8.3 Elmos Semiconductor SE LiDAR Receiver ASIC Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 Elmos Semiconductor SE Main Business Overview
13.8.5 Elmos Semiconductor SE Latest Developments
13.9 Hesai Group
13.9.1 Hesai Group Company Information
13.9.2 Hesai Group LiDAR Receiver ASIC Product Portfolios and Specifications
13.9.3 Hesai Group LiDAR Receiver ASIC Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 Hesai Group Main Business Overview
13.9.5 Hesai Group Latest Developments
13.10 RoboSense Technology Co., Ltd
13.10.1 RoboSense Technology Co., Ltd Company Information

+357 96 030922
info@marketpublishers.com

13.10.2 RoboSense Technology Co., Ltd LiDAR Receiver ASIC Product Portfolios and Specifications
13.10.3 RoboSense Technology Co., Ltd LiDAR Receiver ASIC Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 RoboSense Technology Co., Ltd Main Business Overview
13.10.5 RoboSense Technology Co., Ltd Latest Developments
13.11 indie Semiconductor, Inc.
13.11.1 indie Semiconductor, Inc. Company Information
13.11.2 indie Semiconductor, Inc. LiDAR Receiver ASIC Product Portfolios and Specifications
13.11.3 indie Semiconductor, Inc. LiDAR Receiver ASIC Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 indie Semiconductor, Inc. Main Business Overview
13.11.5 indie Semiconductor, Inc. Latest Developments
13.12 Ouster, Inc.
13.12.1 Ouster, Inc. Company Information
13.12.2 Ouster, Inc. LiDAR Receiver ASIC Product Portfolios and Specifications
13.12.3 Ouster, Inc. LiDAR Receiver ASIC Sales, Revenue, Price and Gross Margin (2021-2026)
13.12.4 Ouster, Inc. Main Business Overview
13.12.5 Ouster, Inc. Latest Developments
13.13 Maxic Technology, Inc.
13.13.1 Maxic Technology, Inc. Company Information
13.13.2 Maxic Technology, Inc. LiDAR Receiver ASIC Product Portfolios and Specifications
13.13.3 Maxic Technology, Inc. LiDAR Receiver ASIC Sales, Revenue, Price and Gross Margin (2021-2026)
13.13.4 Maxic Technology, Inc. Main Business Overview
13.13.5 Maxic Technology, Inc. Latest Developments
13.14 Innoviz Technologies Ltd.
13.14.1 Innoviz Technologies Ltd. Company Information
13.14.2 Innoviz Technologies Ltd. LiDAR Receiver ASIC Product Portfolios and Specifications
13.14.3 Innoviz Technologies Ltd. LiDAR Receiver ASIC Sales, Revenue, Price and Gross Margin (2021-2026)
13.14.4 Innoviz Technologies Ltd. Main Business Overview
13.14.5 Innoviz Technologies Ltd. Latest Developments
13.15 Aeva Technologies, Inc.
13.15.1 Aeva Technologies, Inc. Company Information

+357 96 030922
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13.15.2 Aeva Technologies, Inc. LiDAR Receiver ASIC Product Portfolios and Specifications
13.15.3 Aeva Technologies, Inc. LiDAR Receiver ASIC Sales, Revenue, Price and Gross Margin (2021-2026)
13.15.4 Aeva Technologies, Inc. Main Business Overview
13.15.5 Aeva Technologies, Inc. Latest Developments
13.16 SiLC Technologies, Inc.
13.16.1 SiLC Technologies, Inc. Company Information
13.16.2 SiLC Technologies, Inc. LiDAR Receiver ASIC Product Portfolios and Specifications
13.16.3 SiLC Technologies, Inc. LiDAR Receiver ASIC Sales, Revenue, Price and Gross Margin (2021-2026)
13.16.4 SiLC Technologies, Inc. Main Business Overview
13.16.5 SiLC Technologies, Inc. Latest Developments
13.17 FortSense
13.17.1 FortSense Company Information
13.17.2 FortSense LiDAR Receiver ASIC Product Portfolios and Specifications
13.17.3 FortSense LiDAR Receiver ASIC Sales, Revenue, Price and Gross Margin (2021-2026)
13.17.4 FortSense Main Business Overview
13.17.5 FortSense Latest Developments
13.18 Adaps Photonics
13.18.1 Adaps Photonics Company Information
13.18.2 Adaps Photonics LiDAR Receiver ASIC Product Portfolios and Specifications
13.18.3 Adaps Photonics LiDAR Receiver ASIC Sales, Revenue, Price and Gross Margin (2021-2026)
13.18.4 Adaps Photonics Main Business Overview
13.18.5 Adaps Photonics Latest Developments
13.19 Siliconroad Semiconductor Co., Ltd.
13.19.1 Siliconroad Semiconductor Co., Ltd. Company Information
13.19.2 Siliconroad Semiconductor Co., Ltd. LiDAR Receiver ASIC Product Portfolios and Specifications
13.19.3 Siliconroad Semiconductor Co., Ltd. LiDAR Receiver ASIC Sales, Revenue, Price and Gross Margin (2021-2026)
13.19.4 Siliconroad Semiconductor Co., Ltd. Main Business Overview
13.19.5 Siliconroad Semiconductor Co., Ltd. Latest Developments
13.20 Newsight Imaging Ltd.
13.20.1 Newsight Imaging Ltd. Company Information
13.20.2 Newsight Imaging Ltd. LiDAR Receiver ASIC Product Portfolios and

+357 96 030922
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Specifications
13.20.3 Newsight Imaging Ltd. LiDAR Receiver ASIC Sales, Revenue, Price and Gross Margin (2021-2026)
13.20.4 Newsight Imaging Ltd. Main Business Overview
13.20.5 Newsight Imaging Ltd. Latest Developments
13.21 SOLiDVUE, Inc.
13.21.1 SOLiDVUE, Inc. Company Information
13.21.2 SOLiDVUE, Inc. LiDAR Receiver ASIC Product Portfolios and Specifications
13.21.3 SOLiDVUE, Inc. LiDAR Receiver ASIC Sales, Revenue, Price and Gross Margin (2021-2026)
13.21.4 SOLiDVUE, Inc. Main Business Overview
13.21.5 SOLiDVUE, Inc. Latest Developments
13.22 Weeroc
13.22.1 Weeroc Company Information
13.22.2 Weeroc LiDAR Receiver ASIC Product Portfolios and Specifications
13.22.3 Weeroc LiDAR Receiver ASIC Sales, Revenue, Price and Gross Margin (2021-2026)
13.22.4 Weeroc Main Business Overview
13.22.5 Weeroc Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

+357 96 030922
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List Of Tables

LIST OF TABLES

Table 1. LiDAR Receiver ASIC Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. LiDAR Receiver ASIC Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of Analog Front-End ASIC
Table 4. Major Players of Data Acquisition ASIC
Table 5. Major Players of Other
Table 6. Global LiDAR Receiver ASIC Sales by Type (2021-2026) & (Million Units)
Table 7. Global LiDAR Receiver ASIC Sales Market Share by Type (2021-2026)
Table 8. Global LiDAR Receiver ASIC Revenue by Type (2021-2026) & ($ million)
Table 9. Global LiDAR Receiver ASIC Revenue Market Share by Type (2021-2026)
Table 10. Global LiDAR Receiver ASIC Sale Price by Type (2021-2026) & (US$/Unit)
Table 11. Major Players of Linear-Mode Receiver
Table 12. Major Players of Photon-Counting Receiver
Table 13. Major Players of Coherent Receiver
Table 14. Major Players of Other Receiver Principle
Table 15. Global LiDAR Receiver ASIC Sales by Receiver Principle (2021-2026) & (Million Units)
Table 16. Global LiDAR Receiver ASIC Sales Market Share by Receiver Principle (2021-2026)
Table 17. Global LiDAR Receiver ASIC Revenue by Receiver Principle (2021-2026) & ($ million)
Table 18. Global LiDAR Receiver ASIC Revenue Market Share by Receiver Principle (2021-2026)
Table 19. Global LiDAR Receiver ASIC Sale Price by Receiver Principle (2021-2026) & (US$/Unit)
Table 20. Major Players of External Detector Interface
Table 21. Major Players of Monolithic Integration
Table 22. Major Players of 3D-Stacked Integration
Table 23. Major Players of Photonic-Electronic Integration
Table 24. Major Players of Other
Table 25. Global LiDAR Receiver ASIC Sales by Detector Integration (2021-2026) & (Million Units)
Table 26. Global LiDAR Receiver ASIC Sales Market Share by Detector Integration (2021-2026)

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Table 27. Global LiDAR Receiver ASIC Revenue by Detector Integration (2021-2026) & ($ million)
Table 28. Global LiDAR Receiver ASIC Revenue Market Share by Detector Integration (2021-2026)
Table 29. Global LiDAR Receiver ASIC Sale Price by Detector Integration (2021-2026) & (US$/Unit)
Table 30. Major Players of Single-Channel Receiver
Table 31. Major Players of Multi-Channel Receiver
Table 32. Major Players of Other Channel Configuration
Table 33. Global LiDAR Receiver ASIC Sales by Channel Configuration (2021-2026) & (Million Units)
Table 34. Global LiDAR Receiver ASIC Sales Market Share by Channel Configuration (2021-2026)
Table 35. Global LiDAR Receiver ASIC Revenue by Channel Configuration (2021-2026) & ($ million)
Table 36. Global LiDAR Receiver ASIC Revenue Market Share by Channel Configuration (2021-2026)
Table 37. Global LiDAR Receiver ASIC Sale Price by Channel Configuration (2021-2026) & (US$/Unit)
Table 38. Global LiDAR Receiver ASIC Sale by Application (2021-2026) & (Million Units)
Table 39. Global LiDAR Receiver ASIC Sale Market Share by Application (2021-2026)
Table 40. Global LiDAR Receiver ASIC Revenue by Application (2021-2026) & ($ million)
Table 41. Global LiDAR Receiver ASIC Revenue Market Share by Application (2021-2026)
Table 42. Global LiDAR Receiver ASIC Sale Price by Application (2021-2026) & (US$/Unit)
Table 43. Global LiDAR Receiver ASIC Sales by Company (2021-2026) & (Million Units)
Table 44. Global LiDAR Receiver ASIC Sales Market Share by Company (2021-2026)
Table 45. Global LiDAR Receiver ASIC Revenue by Company (2021-2026) & ($ millions)
Table 46. Global LiDAR Receiver ASIC Revenue Market Share by Company (2021-2026)
Table 47. Global LiDAR Receiver ASIC Sale Price by Company (2021-2026) & (US$/Unit)
Table 48. Key Manufacturers LiDAR Receiver ASIC Producing Area Distribution and Sales Area

+357 96 030922
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Table 49. Players LiDAR Receiver ASIC Products Offered
Table 50. LiDAR Receiver ASIC 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 LiDAR Receiver ASIC Sales by Geographic Region (2021-2026) & (Million Units)
Table 54. Global LiDAR Receiver ASIC Sales Market Share Geographic Region (2021-2026)
Table 55. Global LiDAR Receiver ASIC Revenue by Geographic Region (2021-2026) & ($ millions)
Table 56. Global LiDAR Receiver ASIC Revenue Market Share by Geographic Region (2021-2026)
Table 57. Global LiDAR Receiver ASIC Sales by Country/Region (2021-2026) & (Million Units)
Table 58. Global LiDAR Receiver ASIC Sales Market Share by Country/Region (2021-2026)
Table 59. Global LiDAR Receiver ASIC Revenue by Country/Region (2021-2026) & ($ millions)
Table 60. Global LiDAR Receiver ASIC Revenue Market Share by Country/Region (2021-2026)
Table 61. Americas LiDAR Receiver ASIC Sales by Country (2021-2026) & (Million Units)
Table 62. Americas LiDAR Receiver ASIC Sales Market Share by Country (2021-2026)
Table 63. Americas LiDAR Receiver ASIC Revenue by Country (2021-2026) & ($ millions)
Table 64. Americas LiDAR Receiver ASIC Sales by Type (2021-2026) & (Million Units)
Table 65. Americas LiDAR Receiver ASIC Sales by Application (2021-2026) & (Million Units)
Table 66. APAC LiDAR Receiver ASIC Sales by Region (2021-2026) & (Million Units)
Table 67. APAC LiDAR Receiver ASIC Sales Market Share by Region (2021-2026)
Table 68. APAC LiDAR Receiver ASIC Revenue by Region (2021-2026) & ($ millions)
Table 69. APAC LiDAR Receiver ASIC Sales by Type (2021-2026) & (Million Units)
Table 70. APAC LiDAR Receiver ASIC Sales by Application (2021-2026) & (Million Units)
Table 71. Europe LiDAR Receiver ASIC Sales by Country (2021-2026) & (Million Units)
Table 72. Europe LiDAR Receiver ASIC Revenue by Country (2021-2026) & ($ millions)
Table 73. Europe LiDAR Receiver ASIC Sales by Type (2021-2026) & (Million Units)
Table 74. Europe LiDAR Receiver ASIC Sales by Application (2021-2026) & (Million

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Units)
Table 75. Middle East & Africa LiDAR Receiver ASIC Sales by Country (2021-2026) & (Million Units)
Table 76. Middle East & Africa LiDAR Receiver ASIC Revenue Market Share by Country (2021-2026)
Table 77. Middle East & Africa LiDAR Receiver ASIC Sales by Type (2021-2026) & (Million Units)
Table 78. Middle East & Africa LiDAR Receiver ASIC Sales by Application (2021-2026) & (Million Units)
Table 79. Key Market Drivers & Growth Opportunities of LiDAR Receiver ASIC
Table 80. Key Market Challenges & Risks of LiDAR Receiver ASIC
Table 81. Key Industry Trends of LiDAR Receiver ASIC
Table 82. LiDAR Receiver ASIC Raw Material
Table 83. Key Suppliers of Raw Materials
Table 84. LiDAR Receiver ASIC Distributors List
Table 85. LiDAR Receiver ASIC Customer List
Table 86. Global LiDAR Receiver ASIC Sales Forecast by Region (2027-2032) & (Million Units)
Table 87. Global LiDAR Receiver ASIC Revenue Forecast by Region (2027-2032) & ($ millions)
Table 88. Americas LiDAR Receiver ASIC Sales Forecast by Country (2027-2032) & (Million Units)
Table 89. Americas LiDAR Receiver ASIC Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 90. APAC LiDAR Receiver ASIC Sales Forecast by Region (2027-2032) & (Million Units)
Table 91. APAC LiDAR Receiver ASIC Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 92. Europe LiDAR Receiver ASIC Sales Forecast by Country (2027-2032) & (Million Units)
Table 93. Europe LiDAR Receiver ASIC Revenue Forecast by Country (2027-2032) & ($ millions)
Table 94. Middle East & Africa LiDAR Receiver ASIC Sales Forecast by Country (2027-2032) & (Million Units)
Table 95. Middle East & Africa LiDAR Receiver ASIC Revenue Forecast by Country (2027-2032) & ($ millions)
Table 96. Global LiDAR Receiver ASIC Sales Forecast by Type (2027-2032) & (Million Units)
Table 97. Global LiDAR Receiver ASIC Revenue Forecast by Type (2027-2032) & ($

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millions)
Table 98. Global LiDAR Receiver ASIC Sales Forecast by Application (2027-2032) & (Million Units)
Table 99. Global LiDAR Receiver ASIC Revenue Forecast by Application (2027-2032) & ($ millions)
Table 100. Sony Group Corporation Basic Information, LiDAR Receiver ASIC Manufacturing Base, Sales Area and Its Competitors
Table 101. Sony Group Corporation LiDAR Receiver ASIC Product Portfolios and Specifications
Table 102. Sony Group Corporation LiDAR Receiver ASIC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 103. Sony Group Corporation Main Business
Table 104. Sony Group Corporation Latest Developments
Table 105. Texas Instruments Incorporated Basic Information, LiDAR Receiver ASIC Manufacturing Base, Sales Area and Its Competitors
Table 106. Texas Instruments Incorporated LiDAR Receiver ASIC Product Portfolios and Specifications
Table 107. Texas Instruments Incorporated LiDAR Receiver ASIC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 108. Texas Instruments Incorporated Main Business
Table 109. Texas Instruments Incorporated Latest Developments
Table 110. Infineon Technologies AG Basic Information, LiDAR Receiver ASIC Manufacturing Base, Sales Area and Its Competitors
Table 111. Infineon Technologies AG LiDAR Receiver ASIC Product Portfolios and Specifications
Table 112. Infineon Technologies AG LiDAR Receiver ASIC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 113. Infineon Technologies AG Main Business
Table 114. Infineon Technologies AG Latest Developments
Table 115. Analog Devices, Inc. Basic Information, LiDAR Receiver ASIC Manufacturing Base, Sales Area and Its Competitors
Table 116. Analog Devices, Inc. LiDAR Receiver ASIC Product Portfolios and Specifications
Table 117. Analog Devices, Inc. LiDAR Receiver ASIC Sales (Million Units), Revenue ($ 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, LiDAR Receiver ASIC Manufacturing Base, Sales Area and Its Competitors

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Table 121. Renesas Electronics Corporation LiDAR Receiver ASIC Product Portfolios and Specifications
Table 122. Renesas Electronics Corporation LiDAR Receiver ASIC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 123. Renesas Electronics Corporation Main Business
Table 124. Renesas Electronics Corporation Latest Developments
Table 125. MACOM Technology Solutions Holdings, Inc. Basic Information, LiDAR Receiver ASIC Manufacturing Base, Sales Area and Its Competitors
Table 126. MACOM Technology Solutions Holdings, Inc. LiDAR Receiver ASIC Product Portfolios and Specifications
Table 127. MACOM Technology Solutions Holdings, Inc. LiDAR Receiver ASIC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 128. MACOM Technology Solutions Holdings, Inc. Main Business
Table 129. MACOM Technology Solutions Holdings, Inc. Latest Developments
Table 130. Melexis N.V. Basic Information, LiDAR Receiver ASIC Manufacturing Base, Sales Area and Its Competitors
Table 131. Melexis N.V. LiDAR Receiver ASIC Product Portfolios and Specifications
Table 132. Melexis N.V. LiDAR Receiver ASIC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 133. Melexis N.V. Main Business
Table 134. Melexis N.V. Latest Developments
Table 135. Elmos Semiconductor SE Basic Information, LiDAR Receiver ASIC Manufacturing Base, Sales Area and Its Competitors
Table 136. Elmos Semiconductor SE LiDAR Receiver ASIC Product Portfolios and Specifications
Table 137. Elmos Semiconductor SE LiDAR Receiver ASIC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 138. Elmos Semiconductor SE Main Business
Table 139. Elmos Semiconductor SE Latest Developments
Table 140. Hesai Group Basic Information, LiDAR Receiver ASIC Manufacturing Base, Sales Area and Its Competitors
Table 141. Hesai Group LiDAR Receiver ASIC Product Portfolios and Specifications
Table 142. Hesai Group LiDAR Receiver ASIC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 143. Hesai Group Main Business
Table 144. Hesai Group Latest Developments
Table 145. RoboSense Technology Co., Ltd Basic Information, LiDAR Receiver ASIC Manufacturing Base, Sales Area and Its Competitors
Table 146. RoboSense Technology Co., Ltd LiDAR Receiver ASIC Product Portfolios

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and Specifications
Table 147. RoboSense Technology Co., Ltd LiDAR Receiver ASIC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 148. RoboSense Technology Co., Ltd Main Business
Table 149. RoboSense Technology Co., Ltd Latest Developments
Table 150. indie Semiconductor, Inc. Basic Information, LiDAR Receiver ASIC Manufacturing Base, Sales Area and Its Competitors
Table 151. indie Semiconductor, Inc. LiDAR Receiver ASIC Product Portfolios and Specifications
Table 152. indie Semiconductor, Inc. LiDAR Receiver ASIC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 153. indie Semiconductor, Inc. Main Business
Table 154. indie Semiconductor, Inc. Latest Developments
Table 155. Ouster, Inc. Basic Information, LiDAR Receiver ASIC Manufacturing Base, Sales Area and Its Competitors
Table 156. Ouster, Inc. LiDAR Receiver ASIC Product Portfolios and Specifications
Table 157. Ouster, Inc. LiDAR Receiver ASIC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 158. Ouster, Inc. Main Business
Table 159. Ouster, Inc. Latest Developments
Table 160. Maxic Technology, Inc. Basic Information, LiDAR Receiver ASIC Manufacturing Base, Sales Area and Its Competitors
Table 161. Maxic Technology, Inc. LiDAR Receiver ASIC Product Portfolios and Specifications
Table 162. Maxic Technology, Inc. LiDAR Receiver ASIC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 163. Maxic Technology, Inc. Main Business
Table 164. Maxic Technology, Inc. Latest Developments
Table 165. Innoviz Technologies Ltd. Basic Information, LiDAR Receiver ASIC Manufacturing Base, Sales Area and Its Competitors
Table 166. Innoviz Technologies Ltd. LiDAR Receiver ASIC Product Portfolios and Specifications
Table 167. Innoviz Technologies Ltd. LiDAR Receiver ASIC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 168. Innoviz Technologies Ltd. Main Business
Table 169. Innoviz Technologies Ltd. Latest Developments
Table 170. Aeva Technologies, Inc. Basic Information, LiDAR Receiver ASIC Manufacturing Base, Sales Area and Its Competitors
Table 171. Aeva Technologies, Inc. LiDAR Receiver ASIC Product Portfolios and

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info@marketpublishers.com

Specifications
Table 172. Aeva Technologies, Inc. LiDAR Receiver ASIC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 173. Aeva Technologies, Inc. Main Business
Table 174. Aeva Technologies, Inc. Latest Developments
Table 175. SiLC Technologies, Inc. Basic Information, LiDAR Receiver ASIC Manufacturing Base, Sales Area and Its Competitors
Table 176. SiLC Technologies, Inc. LiDAR Receiver ASIC Product Portfolios and Specifications
Table 177. SiLC Technologies, Inc. LiDAR Receiver ASIC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 178. SiLC Technologies, Inc. Main Business
Table 179. SiLC Technologies, Inc. Latest Developments
Table 180. FortSense Basic Information, LiDAR Receiver ASIC Manufacturing Base, Sales Area and Its Competitors
Table 181. FortSense LiDAR Receiver ASIC Product Portfolios and Specifications
Table 182. FortSense LiDAR Receiver ASIC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 183. FortSense Main Business
Table 184. FortSense Latest Developments
Table 185. Adaps Photonics Basic Information, LiDAR Receiver ASIC Manufacturing Base, Sales Area and Its Competitors
Table 186. Adaps Photonics LiDAR Receiver ASIC Product Portfolios and Specifications
Table 187. Adaps Photonics LiDAR Receiver ASIC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 188. Adaps Photonics Main Business
Table 189. Adaps Photonics Latest Developments
Table 190. Siliconroad Semiconductor Co., Ltd. Basic Information, LiDAR Receiver ASIC Manufacturing Base, Sales Area and Its Competitors
Table 191. Siliconroad Semiconductor Co., Ltd. LiDAR Receiver ASIC Product Portfolios and Specifications
Table 192. Siliconroad Semiconductor Co., Ltd. LiDAR Receiver ASIC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 193. Siliconroad Semiconductor Co., Ltd. Main Business
Table 194. Siliconroad Semiconductor Co., Ltd. Latest Developments
Table 195. Newsight Imaging Ltd. Basic Information, LiDAR Receiver ASIC Manufacturing Base, Sales Area and Its Competitors
Table 196. Newsight Imaging Ltd. LiDAR Receiver ASIC Product Portfolios and

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Specifications
Table 197. Newsight Imaging Ltd. LiDAR Receiver ASIC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 198. Newsight Imaging Ltd. Main Business
Table 199. Newsight Imaging Ltd. Latest Developments
Table 200. SOLiDVUE, Inc. Basic Information, LiDAR Receiver ASIC Manufacturing Base, Sales Area and Its Competitors
Table 201. SOLiDVUE, Inc. LiDAR Receiver ASIC Product Portfolios and Specifications
Table 202. SOLiDVUE, Inc. LiDAR Receiver ASIC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 203. SOLiDVUE, Inc. Main Business
Table 204. SOLiDVUE, Inc. Latest Developments
Table 205. Weeroc Basic Information, LiDAR Receiver ASIC Manufacturing Base, Sales Area and Its Competitors
Table 206. Weeroc LiDAR Receiver ASIC Product Portfolios and Specifications
Table 207. Weeroc LiDAR Receiver ASIC Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 208. Weeroc Main Business
Table 209. Weeroc Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of LiDAR Receiver ASIC
Figure 2. LiDAR Receiver ASIC Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global LiDAR Receiver ASIC Sales Growth Rate 2021-2032 (Million Units)
Figure 7. Global LiDAR Receiver ASIC Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. LiDAR Receiver ASIC Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. LiDAR Receiver ASIC Sales Market Share by Country/Region (2025)
Figure 10. LiDAR Receiver ASIC Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of Analog Front-End ASIC
Figure 12. Product Picture of Data Acquisition ASIC
Figure 13. Product Picture of Other
Figure 14. Global LiDAR Receiver ASIC Sales Market Share by Type in 2026
Figure 15. Global LiDAR Receiver ASIC Revenue Market Share by Type (2021-2026)
Figure 16. Product Picture of Linear-Mode Receiver
Figure 17. Product Picture of Photon-Counting Receiver
Figure 18. Product Picture of Coherent Receiver
Figure 19. Product Picture of Other Receiver Principle
Figure 20. Global LiDAR Receiver ASIC Sales Market Share by Receiver Principle in 2026
Figure 21. Global LiDAR Receiver ASIC Revenue Market Share by Receiver Principle (2021-2026)
Figure 22. Product Picture of External Detector Interface
Figure 23. Product Picture of Monolithic Integration
Figure 24. Product Picture of 3D-Stacked Integration
Figure 25. Product Picture of Photonic-Electronic Integration
Figure 26. Product Picture of Other
Figure 27. Global LiDAR Receiver ASIC Sales Market Share by Detector Integration in 2026
Figure 28. Global LiDAR Receiver ASIC Revenue Market Share by Detector Integration (2021-2026)
Figure 29. Product Picture of Single-Channel Receiver

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Figure 30. Product Picture of Multi-Channel Receiver
Figure 31. Product Picture of Other Channel Configuration
Figure 32. Global LiDAR Receiver ASIC Sales Market Share by Channel Configuration in 2026
Figure 33. Global LiDAR Receiver ASIC Revenue Market Share by Channel Configuration (2021-2026)
Figure 34. LiDAR Receiver ASIC Consumed in Navigation and Obstacle Avoidance
Figure 35. Global LiDAR Receiver ASIC Market: Navigation and Obstacle Avoidance (2021-2026) & (Million Units)
Figure 36. LiDAR Receiver ASIC Consumed in Precision Ranging and Metrology
Figure 37. Global LiDAR Receiver ASIC Market: Precision Ranging and Metrology (2021-2026) & (Million Units)
Figure 38. LiDAR Receiver ASIC Consumed in Mapping and Spatial Reconstruction
Figure 39. Global LiDAR Receiver ASIC Market: Mapping and Spatial Reconstruction (2021-2026) & (Million Units)
Figure 40. LiDAR Receiver ASIC Consumed in Motion and Velocity Measurement
Figure 41. Global LiDAR Receiver ASIC Market: Motion and Velocity Measurement (2021-2026) & (Million Units)
Figure 42. LiDAR Receiver ASIC Consumed in Monitoring and Intrusion Detection
Figure 43. Global LiDAR Receiver ASIC Market: Monitoring and Intrusion Detection (2021-2026) & (Million Units)
Figure 44. LiDAR Receiver ASIC Consumed in Other
Figure 45. Global LiDAR Receiver ASIC Market: Other (2021-2026) & (Million Units)
Figure 46. Global LiDAR Receiver ASIC Sale Market Share by Application (2025)
Figure 47. Global LiDAR Receiver ASIC Revenue Market Share by Application in 2025
Figure 48. LiDAR Receiver ASIC Sales by Company in 2025 (Million Units)
Figure 49. Global LiDAR Receiver ASIC Sales Market Share by Company in 2025
Figure 50. LiDAR Receiver ASIC Revenue by Company in 2025 ($ millions)
Figure 51. Global LiDAR Receiver ASIC Revenue Market Share by Company in 2025
Figure 52. Global LiDAR Receiver ASIC Sales Market Share by Geographic Region (2021-2026)
Figure 53. Global LiDAR Receiver ASIC Revenue Market Share by Geographic Region in 2025
Figure 54. Americas LiDAR Receiver ASIC Sales 2021-2026 (Million Units)
Figure 55. Americas LiDAR Receiver ASIC Revenue 2021-2026 ($ millions)
Figure 56. APAC LiDAR Receiver ASIC Sales 2021-2026 (Million Units)
Figure 57. APAC LiDAR Receiver ASIC Revenue 2021-2026 ($ millions)
Figure 58. Europe LiDAR Receiver ASIC Sales 2021-2026 (Million Units)
Figure 59. Europe LiDAR Receiver ASIC Revenue 2021-2026 ($ millions)

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Figure 60. Middle East & Africa LiDAR Receiver ASIC Sales 2021-2026 (Million Units)
Figure 61. Middle East & Africa LiDAR Receiver ASIC Revenue 2021-2026 ($ millions)
Figure 62. Americas LiDAR Receiver ASIC Sales Market Share by Country in 2025
Figure 63. Americas LiDAR Receiver ASIC Revenue Market Share by Country (2021-2026)
Figure 64. Americas LiDAR Receiver ASIC Sales Market Share by Type (2021-2026)
Figure 65. Americas LiDAR Receiver ASIC Sales Market Share by Application (2021-2026)
Figure 66. United States LiDAR Receiver ASIC Revenue Growth 2021-2026 ($ millions)
Figure 67. Canada LiDAR Receiver ASIC Revenue Growth 2021-2026 ($ millions)
Figure 68. Mexico LiDAR Receiver ASIC Revenue Growth 2021-2026 ($ millions)
Figure 69. Brazil LiDAR Receiver ASIC Revenue Growth 2021-2026 ($ millions)
Figure 70. APAC LiDAR Receiver ASIC Sales Market Share by Region in 2025
Figure 71. APAC LiDAR Receiver ASIC Revenue Market Share by Region (2021-2026)
Figure 72. APAC LiDAR Receiver ASIC Sales Market Share by Type (2021-2026)
Figure 73. APAC LiDAR Receiver ASIC Sales Market Share by Application (2021-2026)
Figure 74. China LiDAR Receiver ASIC Revenue Growth 2021-2026 ($ millions)
Figure 75. Japan LiDAR Receiver ASIC Revenue Growth 2021-2026 ($ millions)
Figure 76. South Korea LiDAR Receiver ASIC Revenue Growth 2021-2026 ($ millions)
Figure 77. Southeast Asia LiDAR Receiver ASIC Revenue Growth 2021-2026 ($ millions)
Figure 78. India LiDAR Receiver ASIC Revenue Growth 2021-2026 ($ millions)
Figure 79. Australia LiDAR Receiver ASIC Revenue Growth 2021-2026 ($ millions)
Figure 80. China Taiwan LiDAR Receiver ASIC Revenue Growth 2021-2026 ($ millions)
Figure 81. Europe LiDAR Receiver ASIC Sales Market Share by Country in 2025
Figure 82. Europe LiDAR Receiver ASIC Revenue Market Share by Country (2021-2026)
Figure 83. Europe LiDAR Receiver ASIC Sales Market Share by Type (2021-2026)
Figure 84. Europe LiDAR Receiver ASIC Sales Market Share by Application (2021-2026)
Figure 85. Germany LiDAR Receiver ASIC Revenue Growth 2021-2026 ($ millions)
Figure 86. France LiDAR Receiver ASIC Revenue Growth 2021-2026 ($ millions)
Figure 87. UK LiDAR Receiver ASIC Revenue Growth 2021-2026 ($ millions)
Figure 88. Italy LiDAR Receiver ASIC Revenue Growth 2021-2026 ($ millions)
Figure 89. Russia LiDAR Receiver ASIC Revenue Growth 2021-2026 ($ millions)
Figure 90. Middle East & Africa LiDAR Receiver ASIC Sales Market Share by Country (2021-2026)
Figure 91. Middle East & Africa LiDAR Receiver ASIC Sales Market Share by Type (2021-2026)

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Figure 92. Middle East & Africa LiDAR Receiver ASIC Sales Market Share by Application (2021-2026)
Figure 93. Egypt LiDAR Receiver ASIC Revenue Growth 2021-2026 ($ millions)
Figure 94. South Africa LiDAR Receiver ASIC Revenue Growth 2021-2026 ($ millions)
Figure 95. Israel LiDAR Receiver ASIC Revenue Growth 2021-2026 ($ millions)
Figure 96. Turkey LiDAR Receiver ASIC Revenue Growth 2021-2026 ($ millions)
Figure 97. GCC Countries LiDAR Receiver ASIC Revenue Growth 2021-2026 ($ millions)
Figure 98. Manufacturing Cost Structure Analysis of LiDAR Receiver ASIC in 2026
Figure 99. Manufacturing Process Analysis of LiDAR Receiver ASIC
Figure 100. Industry Chain Structure of LiDAR Receiver ASIC
Figure 101. Channels of Distribution
Figure 102. Global LiDAR Receiver ASIC Sales Market Forecast by Region (2027-2032)
Figure 103. Global LiDAR Receiver ASIC Revenue Market Share Forecast by Region (2027-2032)
Figure 104. Global LiDAR Receiver ASIC Sales Market Share Forecast by Type (2027-2032)
Figure 105. Global LiDAR Receiver ASIC Revenue Market Share Forecast by Type (2027-2032)
Figure 106. Global LiDAR Receiver ASIC Sales Market Share Forecast by Application (2027-2032)
Figure 107. Global LiDAR Receiver ASIC Revenue Market Share Forecast by Application (2027-2032)

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