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Global ZVS Flyback Controller Chip Market Growth 2026-2032

https://marketpublishers.com/r/GF2918E503DFEN.html
Date: October 2026
Pages: 96
Price: US$ 3,660.00 (Single User License)
ID: GF2918E503DFEN

Abstracts

The global ZVS Flyback Controller Chip market size is predicted to grow from US$ 62.61 million in 2025 to US$ 113 million in 2032; it is expected to grow at a CAGR of 9.0% from 2026 to 2032.

ZVS flyback controllers are application-specific integrated circuits (ASICs) used in quasi-resonant flyback switching power supplies. They reduce switching losses and improve electromagnetic compatibility by achieving zero-voltage turn-on during switching. ZVS flyback controllers are widely used in mobile phone and laptop adapters, fast chargers, set-top box and TV power supplies, LED lighting drivers, and low-power industrial and communication power supplies. Global shipments in 2024 were approximately 65 million units, with an average selling price of approximately US$0.90 per unit. Typical single-line annual capacity is approximately 5 million units. The upstream industry involves analog and power semiconductor design, wafer foundry, power MOSFETs, and RF components. The downstream industry covers packaging materials and testing services, with customers including power module manufacturers, adapter and charger manufacturers, consumer electronics OEMs, lighting and industrial power supply manufacturers, and system integrators. The industry average gross margin is approximately 38%. In terms of product cost structure, silicon wafers and wafer manufacturing costs account for approximately 45%, packaging and testing for approximately 25%, R&D, IP, and firmware for approximately 10%, testing and verification for approximately 5%, and sales management and logistics for approximately 15%. Products can be categorized by parameters, such as control modes (e.g., voltage mode and current mode), operating modes (e.g., quasi-resonant QR, valley phase-locked loop, and multi-mode), and startup and power supply methods (e.g., built-in high-voltage startup and auxiliary startup). Power supply types are categorized by integration level into standard, highly integrated, and digitally intelligent

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types. Furthermore, power supplies can be classified by application area into adapters/chargers, home appliance power supplies, and industrial power supplies. Demand and opportunity analysis indicates that downstream demand includes high-efficiency, low standby power supplies; high-power-density miniaturized solutions; control chips compatible with fast charging protocols; solutions for improving electromagnetic interference and thermal management; and low-cost, high-reliability packaging. Downstream customers include power IC design companies, adapter and charger manufacturers, mobile phone and laptop OEMs, TV and set-top box manufacturers, LED lighting companies, industrial control and communication power supply manufacturers, and system integrators. Business opportunities stem from policy-driven factors, such as upgraded energy efficiency standards and standby power consumption regulations prompting product upgrades; and from technological innovation-driven factors, such as combining with wide-bandgap semiconductor gallium nitride (GaN) to achieve solutions with higher frequencies and higher efficiency, integrating more functions on the chip to reduce bill of materials (BOM) and system costs, and the new demands for intelligent power management brought about by digital control and communication interfaces. Consumer demand is driving strong demand for fast charging, higher energy efficiency, smaller size, and lower noise. Combining these trends, the main business opportunities will be upgrading ZVS flyback controllers compatible with high-efficiency, digital, and wide-bandgap devices, as well as custom design and packaging innovations.

United States market for ZVS Flyback Controller Chip is estimated to increase from US$ million in 2025 to US$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for ZVS Flyback Controller Chip is estimated to increase from US$ million in 2025 to US$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for ZVS Flyback Controller Chip is estimated to increase from US$ million in 2025 to US$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key ZVS Flyback Controller Chip players cover ST, infineon, Renesas Electronics, MPS, PI, etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “ZVS Flyback Controller Chip Industry Forecast” looks at past sales and reviews total world ZVS Flyback Controller

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Chip sales in 2025, providing a comprehensive analysis by region and market sector of projected ZVS Flyback Controller Chip sales for 2026 through 2032. With ZVS Flyback Controller Chip sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world ZVS Flyback Controller Chip industry.

This Insight Report provides a comprehensive analysis of the global ZVS Flyback Controller Chip 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 ZVS Flyback Controller Chip portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global ZVS Flyback Controller Chip market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for ZVS Flyback Controller Chip 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 ZVS Flyback Controller Chip.

This report presents a comprehensive overview, market shares, and growth opportunities of ZVS Flyback Controller Chip market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Voltage Mode

Current Mode

Segmentation by Power Supply Type:

Internal High-Voltage Start-up Type

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External Power Supply Type

Segmentation by Integrated Type:

Standard Type

Highly Integrated Type

Consumer Electronics

Segmentation by Application:

Automotive

Home Appliances

Industrial Power Supply

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

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- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

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

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

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ST

infineon

Renesas Electronics

MPS

PI

Richtek

SouthChip

TI

Silergy

Hangzhou Silan Microelectronics

Key Questions Addressed in this Report

What is the 10-year outlook for the global ZVS Flyback Controller Chip market?

What factors are driving ZVS Flyback Controller Chip market growth, globally and by region?

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

How do ZVS Flyback Controller Chip market opportunities vary by end market size?

How does ZVS Flyback Controller Chip break out by Type, by Application?

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