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Global ZVS QR Flyback Controller Chip Market Growth 2026-2032

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Abstracts

The global ZVS QR Flyback Controller Chip market size is predicted to grow from US$ 42.55 million in 2025 to US$ 77.06 million in 2032; it is expected to grow at a CAGR of 9.0% from 2026 to 2032.

ZVS QR flyback controller chips are a type of dedicated control integrated circuit used in quasi-resonant flyback switching power supplies. They enable zero-voltage turn-on to reduce switching losses and improve electromagnetic compatibility performance. They are commonly found in mobile phone and laptop power adapters, fast chargers, TV and set-top box power supplies, LED drivers, and low-power industrial power supplies. Global shipments in 2024 were approximately 45 million units, with an average selling price of approximately $0.90 per unit. A typical single-line annual capacity is approximately 5 million units. The upstream industry involves analog and power semiconductor design, wafer foundry, and compound semiconductors. The industry is primarily focused on semiconductor and packaging material supply, with downstream customers including power module manufacturers, adapter and charger manufacturers, consumer electronics OEMs, lighting and industrial power supply manufacturers, and system integrators. The industry's average gross profit margin is approximately 38%. In terms of product cost structure, silicon wafers and wafer manufacturing costs account for about 45%, packaging and testing about 25%, R&D, IP, and firmware about 10%, quality testing and verification about 5%, and sales, management, and logistics about 15%. Products can be categorized by parameters into control modes such as voltage mode and current mode, and operating modes such as quasi-resonant QR, valley-locked, and multi-mode. Power supply and startup methods are categorized into high-voltage internal startup and auxiliary power supply types. Integration levels are classified as standard, highly integrated, and digitally intelligent. Applications are categorized into adapters and chargers, home appliance power supplies, and industrial

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power supplies. Demand and opportunity analysis shows that downstream demand includes high-efficiency and low standby power consumption power supplies, high power density and miniaturized solutions, driver chips compatible with fast charging protocols, EMI improvement solutions, and cost-effective, high-reliability packaging. Downstream customer lists include power IC companies, adapter and charger manufacturers, notebook and mobile phone OEMs, and TV and set-top box manufacturers. For manufacturers, LED lighting companies, industrial power supply manufacturers, and system integrators, business opportunities stem from policy-driven factors such as rising energy efficiency and standby power consumption standards and regulatory requirements for lower-energy-consumption electronic products. Technological innovation is also driving opportunities, including high-frequency, high-efficiency solutions using wide-bandgap semiconductors such as gallium nitride, on-chip integration of more functions to reduce BOM and system costs, and intelligent power management based on digital control and communication interfaces. Consumer demands are also driving the need for fast charging, higher energy efficiency, smaller size, and lower noise. Considering these trends, the main business opportunities will be the upgrading and customization of ZVS QR controllers that are compatible with high-efficiency, digital, and wide-bandgap devices.

United States market for ZVS QR 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 QR 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 QR 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 QR Flyback Controller Chip players cover ST, infineon, MPS, PI, Richtek, 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 QR Flyback Controller Chip Industry Forecast” looks at past sales and reviews total world ZVS QR Flyback Controller Chip sales in 2025, providing a comprehensive analysis by region and market sector of projected ZVS QR Flyback Controller Chip sales for 2026 through 2032. With ZVS QR Flyback Controller Chip sales broken down by region, market sector and sub-

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sector, this report provides a detailed analysis in US$ millions of the world ZVS QR Flyback Controller Chip industry.

This Insight Report provides a comprehensive analysis of the global ZVS QR 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 QR 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 QR Flyback Controller Chip market.

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

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

Market Segmentation

Segmentation by Type:

Withstand Voltage: 600V

Withstand Voltage: 750V

Withstand Voltage: 900V

Other

Segmentation by Power Supply Type:

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Internal High-Voltage Start-up Type

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

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China

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

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from primary experts and analysing the company's coverage, product portfolio, its market penetration.

ST

infineon

MPS

PI

Richtek

SouthChip

TI

Silergy

Key Questions Addressed in this Report

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

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

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

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

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

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