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LiDAR Chips Market Forecasts to 2034 – Global Analysis By LiDAR Type (Time-of-Flight (ToF) LiDAR Chips, Frequency-Modulated Continuous Wave (FMCW) LiDAR Chips, Flash LiDAR Chips and Solid-State LiDAR Chips), Chip Type, Wavelength, Application, End User and By Geography

https://marketpublishers.com/r/LDD1A6C35D40EN.html
Date: May 2026
Pages: 200
Price: US$ 4,150.00 (Single User License)
ID: LDD1A6C35D40EN

Abstracts

According to Stratistics MRC, the Global LiDAR Chips Market is accounted for $0.8 billion in 2026 and is expected to reach $3.1 billion by 2034 growing at a CAGR of 18.0% during the forecast period. LiDAR chips are compact semiconductor devices engineered to power light detection and ranging technologies. They combine key elements such as lasers, photodetectors, and processing circuits to calculate distances by capturing reflected light pulses. Commonly applied in self-driving cars, robotics, and safety systems, these chips enable detailed 3D imaging and accurate object recognition. Innovations are aimed at enhancing efficiency, extending detection range, and minimizing costs. With increasing reliance on advanced sensing solutions, LiDAR chips play a vital role in delivering accurate spatial insights and real-time environmental understanding for a wide range of modern technological applications.

According to NASA Earth Observatory and U.S. Geological Survey (USGS) remote sensing documentation, LiDAR (Light Detection and Ranging) technology is widely used for high-precision terrain mapping and elevation modelling, with vertical accuracy often within 10–15 cm in modern airborne systems, enabling detailed 3D surface reconstruction for environmental and infrastructure analysis.

Market Dynamics:

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Driver:

Rising adoption of autonomous vehicles

The expansion of autonomous driving technologies is significantly boosting the demand for LiDAR chips. Self-driving vehicles depend on reliable sensing systems to interpret surroundings and ensure safe navigation. LiDAR chips play a crucial role by delivering accurate spatial data and enabling detailed 3D environmental mapping. Automotive manufacturers are incorporating these chips into advanced safety and automation features to improve performance. With increasing investments, favorable regulations, and advancements in autonomous mobility, the need for efficient and compact LiDAR chips is rising rapidly, fostering innovation and accelerating widespread adoption within the global automotive industry.

Restraint:

High cost of LiDAR technology

The expensive nature of LiDAR chip technology acts as a major barrier to its widespread adoption. The integration of complex elements like laser emitters and sensing components drives up manufacturing costs significantly. As a result, LiDAR solutions are often priced higher than competing technologies such as cameras or radar systems. This cost factor discourages smaller companies and budget-conscious industries from implementing LiDAR-based systems. Despite efforts to lower production expenses through innovation, affordability challenges persist, restricting broader usage, especially in price-sensitive markets and applications where cost efficiency is a primary concern.

Opportunity:

Growing applications in smart cities and urban planning

The rise of smart city initiatives is opening up promising opportunities for LiDAR chips. Urban development projects increasingly rely on advanced technologies for better planning, monitoring, and traffic control. LiDAR chips help generate precise spatial data, which is crucial for efficient city management. Their role in improving safety and enabling real-time insights makes them highly valuable. With expanding urbanization and government investments in digital infrastructure, the demand for LiDAR-based solutions is growing, supporting the integration of these chips into modern urban

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ecosystems worldwide.

Threat:

Intense competition from alternative sensing technologies

Strong competition from other sensing technologies represents a significant threat to the LiDAR chips market. Solutions like radar, cameras, and ultrasonic sensors are preferred in many cases because they are more affordable and easier to deploy. These alternatives often meet the requirements of various applications, reducing the need for LiDAR systems. As businesses focus on minimizing costs, they may opt for combined or substitute technologies instead of LiDAR. This situation restricts the growth potential of LiDAR chips and makes it difficult for manufacturers to establish them as a widely adopted standard.

Covid-19 Impact:

The COVID-19 outbreak influenced the LiDAR chips market in both negative and positive ways. Early in the pandemic, supply chain interruptions and factory shutdowns slowed production and reduced demand, particularly from automotive and industrial applications. Despite these challenges, the situation drove increased adoption of automation, robotics, and smart technologies to minimize human interaction. This shift created new opportunities for LiDAR-based solutions. As global markets began to stabilize, investments in autonomous systems and advanced sensing technologies increased again, supporting market recovery and reinforcing the role of LiDAR chips in modern technological advancements.

The application-specific integrated circuits (ASICs) segment is expected to be the largest during the forecast period

The application-specific integrated circuits (ASICs) segment is expected to account for the largest market share during the forecast period because of their superior efficiency and specialized design capabilities. These chips are tailored for dedicated functions, making them ideal for applications requiring fast processing, high precision, and energy efficiency, especially in automotive and autonomous systems. ASICs support real-time LiDAR data interpretation and seamless sensor integration, improving overall system performance. Their suitability for mass production and optimized cost structure further enhances their market position.

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The robotics & drones segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the robotics & drones segment is predicted to witness the highest growth rate because of its expanding applications across multiple industries. These technologies depend on LiDAR for accurate positioning, navigation, and environment mapping in dynamic settings. The rising use of drones in areas such as logistics, agriculture, monitoring, and delivery services is strongly boosting demand. At the same time, robotics in industrial and warehouse operations increasingly relies on LiDAR for improved precision and efficiency. Ongoing technological advancements and decreasing costs are further supporting rapid growth in this segment.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share because of its advanced automotive sector, strong presence of technology firms, and significant investment in autonomous driving technologies. Early adoption of driver-assistance systems and self-driving vehicles is boosting demand for LiDAR solutions. The region also benefits from established LiDAR chip manufacturers and ongoing research and development activities that enhance innovation. Government initiatives supporting defense and technological advancement further accelerate adoption. In addition, increasing use of LiDAR in robotics, smart infrastructure, and industrial automation strengthens regional dominance.

Region with highest CAGR:

Over the forecast period, the Asia-Pacific region is anticipated to exhibit the highest CAGR, driven by rapid industrial expansion and rising adoption of advanced automotive and automation technologies. Key countries like China, Japan, and South Korea are investing significantly in electric vehicles, robotics, and driver-assistance systems, increasing demand for LiDAR solutions. The region’s strong semiconductor manufacturing base and government support for smart infrastructure further enhance growth prospects. Additionally, increasing urbanization and automation across multiple industries are fueling adoption, positioning Asia-Pacific as the leading high-growth region.

Key players in the market

Some of the key players in LiDAR Chips Market include Aeva Inc., indie Semiconductor,

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Inc., LeddarTech Holdings Inc., Scantinel Photonics, SiLC Technologies, Voyant Photonics, Infineon Technologies AG, Mobileye Technologies Limited, Qualcomm Technologies, Inc., Renesas Electronics Corporation, STMicroelectronics N.V., Synopsys, Inc., Texas Instruments Incorporated, Analog Devices, Inc. (ADI), Sony Corporation, ON Semiconductor, ams-OSRAM AG and Velodyne Lidar.

Key Developments:

In February 2026, STMicroelectronics (STM) unveiled an expanded multi-year, multi-billion-dollar collaboration with Amazon Web Services (AMZN), spanning multiple product lines, including a warrant issuance to AWS for up to 24.8 million ST shares. The collaboration establishes STMicroelectronics (STM) as a strategic supplier of advanced semiconductor technologies and products that AWS integrates into its compute infrastructure.

In January 2026, Qualcomm Technologies, Inc. and Hyundai Mobis announced that the companies have signed a comprehensive agreement at CES 2026 to co-develop next-generation solutions for Software-Defined Vehicles (SDV) and Advanced Driver Assistance Systems (ADAS). Through this collaboration, Hyundai Mobis and Qualcomm Technologies will jointly develop integrated solutions tailored for emerging markets.

In October 2025, Analog Devices, Inc. and ASE Technology Holding Co. announced a strategic collaboration in Penang, Malaysia, mar?ked by the signing of a binding Memorandum of Understanding (MoU). Under the proposed agreement, ASE? plans to acquire 100% of the equity in Analog Device?s Sdn. Bhd., whi?ch includes ADI’s manufacturing facility in Penang. Alongs?ide this?, the two compa?nies intend toestablish a long-term supply agreement, allowing ASE to provide manufacturing services for ADI.

LiDAR Types Covered:

Time-of-Flight (ToF) LiDAR Chips

Frequency-Modulated Continuous Wave (FMCW) LiDAR Chips

Flash LiDAR Chips

Solid-State LiDAR Chips

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Chip Types Covered:

- Application-Specific Integrated Circuits (ASICs)
- Field-Programmable Gate Arrays (FPGAs)
- System-on-Chip (SoC) LiDAR Processors
- Photonic Integrated Circuits (PICs)

Wavelengths Covered:

- Near-Infrared (NIR) LiDAR Chips (905 nm)
- Short-Wave Infrared (SWIR) LiDAR Chips (1550 nm)
- Mid-Infrared (MIR) LiDAR Chips (2000-5000 nm)

Applications Covered:

- Autonomous Vehicles
- Robotics & Drones
- Industrial Automation
- Smart Infrastructure & Mapping
- Defense & Aerospace

End Users Covered:

- Automotive OEMs
- Consumer Electronics Manufacturers

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- Industrial Enterprises
- Government & Defense Agencies

Regions Covered:

- North America
  - United States
  - Canada
  - Mexico
- Europe
  - United Kingdom
  - Germany
  - France
  - Italy
  - Spain
  - Netherlands
  - Belgium
  - Sweden
  - Switzerland
  - Poland
  - Rest of Europe

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- Asia Pacific
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  - Japan
  - India
  - South Korea
  - Australia
  - Indonesia
  - Thailand
  - Malaysia
  - Singapore
  - Vietnam
  - Rest of Asia Pacific
- South America
  - Brazil
  - Argentina
  - Colombia
  - Chile
  - Peru
  - Rest of South America
- Rest of the World (RoW)

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- Middle East
  - Saudi Arabia
  - United Arab Emirates
  - Qatar
  - Israel
  - Rest of Middle East
- Africa
  - South Africa
  - Egypt
  - Morocco
  - Rest of Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

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  - SWOT Analysis of key players (up to 3)
- Regional Segmentation
  - Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)
- Competitive Benchmarking
  - Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) Regions are also represented in the same manner as above.

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