

# Global Sub-GHz Module Market Research Report 2026(Status and Outlook)

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## Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Sub-GHz Module competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. A Sub-GHz module is a low-power wireless communication module operating below 1 GHz (commonly 315 MHz, 433 MHz, 470 MHz, 868 MHz, 915 MHz), integrating an RF transceiver, baseband processing, antenna interface, and often MCU/firmware, designed to provide long-range, low-data-rate, low-power wireless connectivity for IoT, smart metering, industrial automation, and remote-control applications. In the upstream segment, semiconductor foundries, RF transceiver chipset makers, antenna suppliers, PCB manufacturers, and component vendors provide RF chips, MCUs, passive components, crystals, and shielding materials; the midstream layer consists of module manufacturers who design, integrate, program firmware, test RF performance, certify regulatory compliance, and supply ready-to-embed Sub-GHz modules; and in the downstream segment OEMs, IoT device makers, utilities, industrial companies, and system integrators embed these modules into smart meters, remote sensors, industrial control units, and building-automation systems, enabling long-range, low-power connectivity with recurring service, data-management, and after-sales opportunities. Major ongoing and planned projects include nationwide smart water/gas/heat meter rollouts in Asia-Pacific and Europe adopting Sub-GHz connectivity, large-scale agricultural IoT deployments using long-range ISM-band modules, industrial automation retrofits integrating Sub-GHz sensor modules in factories, utility AMI/AMR upgrade programs in emerging markets selecting Sub-GHz solutions due to long-range reliability, and expansion of LoRaWAN and proprietary Sub-GHz networks by telecom and IoT operators, with additional design wins for Sub-GHz modules in smart home devices, security systems, and environmental monitoring.

projects scheduled for 2024-2026. 2024 Global Market sales Volume: 450 million units, Average Global Market Price: US\$ 5.5 per unit, Market Average Gross Profit Margin: 28%. The Sub-GHz module market is experiencing sustained growth driven by the global expansion of IoT, smart metering, and industrial automation applications requiring long-range, low-power communication. Sub-GHz technology continues to outperform 2.4 GHz in range, penetration, and power efficiency, making it a preferred choice for utility meters and remote sensors in harsh outdoor environments. Regional analysis shows that Europe and Asia-Pacific are the strongest adopters, with large-scale AMI deployments and utility digitalization programs. North America demonstrates high volume in industrial and agricultural IoT, especially in 915 MHz systems, while emerging markets are rapidly adopting low-cost Sub-GHz modules for municipal and smart-city applications. Market trends show rising demand for LoRaWAN, shifts toward SoC-integrated modules for lower cost, higher TX-power modules for long-range telemetry, and adoption of secure firmware and edge-processing capabilities. Competitive characteristics indicate a fragmented but technologically differentiated market, where leading players compete on RF performance, certifications, power efficiency, firmware stack maturity, and long-term supply capabilities. Price erosion is noticeable in consumer-grade modules but offset by strong growth in utility and industrial segments. Overall, the Sub-GHz module market is set for multi-year expansion as IoT connectivity continues shifting toward long-range, low-power architectures, especially in metering and industrial automation.

The global Sub-GHz Module market size was estimated at USD 2475.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 6.40% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Sub-GHz Module market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Sub-GHz Module market. It offers detailed profiles of major players, including their market shares,

performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Sub-GHz Module market.

## **Global Sub-GHz Module Market: Market Segmentation Analysis**

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

### **Key Company**

Microchip Technology  
Shenzhen Hope Microelectronics Co., Ltd  
STMicroelectronics  
Silicon Laboratories  
Texas Instruments  
Digi International  
Silicon Labs

### **Market Segmentation (by Type)**

RF Module  
Wireless Module

### **Market Segmentation (by Application)**

Smart Home and Smart City  
Smart Factory  
Smart Grid  
Others

### **Geographic Segmentation**

North America (USA, Canada, Mexico)  
Europe (Germany, UK, France, Russia, Italy, Rest of Europe)  
Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)  
South America (Brazil, Argentina, Columbia, Rest of South America)  
The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

### **Key Benefits of This Market Research:**

Industry drivers, restraints, and opportunities covered in the study  
Neutral perspective on the market performance  
Recent industry trends and developments  
Competitive landscape & strategies of key players  
Potential & niche segments and regions exhibiting promising growth covered  
Historical, current, and projected market size, in terms of value  
In-depth analysis of the Sub-GHz Module Market  
Overview of the regional outlook of the Sub-GHz Module Market:

### **Customization of the Report**

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

### **Chapter Outline**

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Sub-GHz Module Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Sub-GHz Module, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

## **Key Reasons to Buy this Report:**

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

## **Customization of the Report**

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