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Global BPSK Carrier Communication Chip Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global BPSK Carrier Communication Chip market size is expected to reach $ 804 million by 2032, rising at a market growth of 4.8% CAGR during the forecast period (2026-2032).

BPSK Power Line Carrier Communication Chips are modem and communication control integrated circuits used to transmit data over existing power lines by superimposing carrier signals onto AC or DC power networks. The market focuses on BPSK, DBPSK, BPSK/DSS, NB-PLC, HPLC, and PLC+RF dual-mode communication chips where BPSK or BPSK-supported modulation is part of the power line communication function. These chips typically integrate a PLC modem, digital signal processing or MCU core, memory, ADC/DAC, synchronization, channel estimation, error correction, MAC control, security functions, and host interfaces. They are mainly used in smart meter communication modules, AMI concentrators, data collectors, low-voltage distribution monitoring, solar monitoring, smart home devices, building automation, and industrial IoT communication nodes.

Key Findings

China is the largest supplier and demand region for BPSK-supported PLC communication chips

HPLC and PLC+RF dual-mode chips are replacing legacy narrowband BPSK products

Smart meter communication modules remain the largest application base

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Core suppliers include Chinese grid-focused vendors and international NB-PLC modem IC companies

Market Trends

The market is shifting from legacy BPSK narrowband carrier communication toward HPLC, OFDM, dual-mode PLC+RF, and security-enhanced communication SoCs. Customers increasingly require higher data rates, faster network formation, stronger field reliability, chip identity management, and interoperability with grid communication standards. BPSK remains relevant as a robust modulation mode, but it is increasingly embedded within multi-mode PLC SoCs rather than sold only as a standalone narrowband modem architecture.

Market Dynamics

Drivers

Market demand is driven by smart grid digitalization, smart meter communication module replacement, low-voltage distribution monitoring, feeder-area topology identification, outage reporting, distributed solar monitoring, and energy IoT expansion. Power line communication remains attractive because it uses existing power infrastructure and avoids additional wiring, which is valuable in metering, distribution networks, buildings, and industrial sites.

Restraints

The key restraint is the replacement pressure on legacy narrowband BPSK chips. As HPLC, OFDM, G3-PLC, PRIME, and PLC+RF dual-mode communication expand, purely single-function BPSK modem chips face a narrower addressable market. The market is also limited by strong customer certification requirements, grid-specific standards, module-level pricing pressure, and the difficulty of separating chip revenue from module and system revenue.

Opportunities

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Opportunities are strongest in HPLC dual-mode upgrades, smart distribution network monitoring, distributed photovoltaic communication, grid-side energy IoT, overseas smart metering, and PLC connectivity for smart homes and industrial equipment. Suppliers that can combine PLC modem IP, security engines, robust field algorithms, AFE/PA coordination, and module reference designs are better positioned to win higher-value projects.

Challenges

Key challenges include power line noise, attenuation, impedance variation, electromagnetic compatibility, field interoperability, security requirements, and long validation cycles with grid customers. Suppliers must prove not only chip-level modulation capability, but also system-level reliability, protocol compatibility, batch consistency, long-term supply, and stable operation in complex low-voltage distribution networks.

Industry Chain Analysis

The upstream chain includes semiconductor IP, mixed-signal IC design, DSP/MCU cores, memory, ADC/DAC, analog front-end circuits, line drivers, power amplifiers, security engines, wafer fabrication, packaging, and testing. Midstream suppliers provide BPSK PLC modem ICs, NB-PLC chips, HPLC SoCs, PLC+RF dual-mode SoCs, PA companion chips, and reference designs. Downstream customers include smart meter manufacturers, PLC module makers, AMI equipment suppliers, grid terminal manufacturers, solar monitoring vendors, smart home device makers, and industrial IoT equipment suppliers.

Segment Insights

By architecture, HPLC chips supporting BPSK modes represent the largest value segment because grid customers are moving toward higher-speed and multi-service communication. Legacy BPSK and BPSK/DSS chips remain relevant in low-cost and replacement applications, while NB-PLC chips supporting DBPSK/BPSK remain important in overseas smart metering standards. By application, smart meter communication modules account for the largest demand share, followed by AMI concentrators, collectors, and low-voltage distribution monitoring.

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Downstream Market Opportunities

The most attractive downstream opportunities are in applications where power line communication can reduce wiring cost and improve grid or device connectivity. Smart meter replacement, HPLC dual-mode communication, distributed solar monitoring, feeder-area management, smart building control, and industrial energy monitoring are the key demand areas. The value opportunity is moving from basic data transmission toward real-time sensing, secure device access, and grid-side digital operation.

Regional Insights

Mainland China is the largest market and supplier base, supported by smart grid investment, domestic HPLC standards, smart meter module demand, and a broad local chip ecosystem. Europe, North America, and Japan remain important in NB-PLC, G3-PLC, PRIME, and overseas smart metering applications. Israel has a small but technically relevant PLC chip presence through specialist suppliers. Regional competition is increasingly split between China’s HPLC-driven grid ecosystem and international NB-PLC standard ecosystems.

Competitive Landscape Analysis

The market is led by a combination of Chinese grid-focused PLC chip suppliers and international NB-PLC modem IC vendors. HiSilicon, Leaguer Microelectronics, Eastsoft Carrier, Hi-trend Technology, Topscomm, Shanghai Belling, Smart Chip Microelectronics, Wuqi Microelectronics, Siliconductor, and Jiayuan Technology are mainly positioned around China’s smart grid, HPLC, and domestic energy IoT ecosystem. STMicroelectronics, Microchip, Renesas, Analog Devices, Semitech, Infineon, and Yitran participate through NB-PLC, G3-PLC, PRIME, building automation, or overseas smart metering markets. Competition is moving from legacy BPSK modem supply toward multi-mode PLC SoCs, protocol interoperability, field reliability, security integration, and system-level reference designs.

Report Scope

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This report studies the global BPSK Carrier Communication Chip production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for BPSK Carrier Communication Chip and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of BPSK Carrier Communication Chip that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global BPSK Carrier Communication Chip total production and demand, 2021-2032, (Million Units)

Global BPSK Carrier Communication Chip total production value, 2021-2032, (USD Million)

Global BPSK Carrier Communication Chip production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Units), (based on production site)

Global BPSK Carrier Communication Chip consumption by region & country, CAGR, 2021-2032 & (Million Units)

U.S. VS China: BPSK Carrier Communication Chip domestic production, consumption, key domestic manufacturers and share

Global BPSK Carrier Communication Chip production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Units)

Global BPSK Carrier Communication Chip production by Frequency Band, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global BPSK Carrier Communication Chip production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

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This report profiles key players in the global BPSK Carrier Communication Chip market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include HiSilicon Technologies Co., Ltd., Shenzhen Leaguer Microelectronics Corp., Qingdao Eastsoft Communication Technology Co., Ltd., STMicroelectronics N.V., Hi-trend Technology (Shanghai) Co., Ltd., Qingdao Topscomm Communication Co., Ltd., Microchip Technology Incorporated, Renesas Electronics Corporation, Shanghai Belling Co., Ltd., Analog Devices, Inc., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World BPSK Carrier Communication Chip market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Million Units) and average price (US$/Unit) by manufacturer, by Frequency Band, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global BPSK Carrier Communication Chip Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

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India

Rest of World

Market Segmentation

Global BPSK Carrier Communication Chip Market, Segmentation by Frequency Band:

Below 150 kHz NB-PLC

150 kHz–500 kHz NB-PLC

0.7 MHz–12 MHz HPLC

12 MHz–30 MHz Extended PLC

Global BPSK Carrier Communication Chip Market, Segmentation by Integration Level:

Modem-Only PLC ICs

PLC SoC with MCU and Memory

PLC SoC with AFE / PA Companion

PLC+RF Dual-Mode SoC

Security-Enhanced PLC SoC

Global BPSK Carrier Communication Chip Market, Segmentation by Modulation and Protocol Architecture:

Legacy Single/Dual-Carrier BPSK PLC Chips

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BPSK/DSS PLC Modem ICs

NB-PLC OFDM Chips with DBPSK/BPSK

HPLC Chips Supporting BPSK Modes

PLC+RF Dual-Mode Communication Chips

Global BPSK Carrier Communication Chip Market, Segmentation by Application:

Smart Meter Communication Modules

AMI Concentrators and Collectors

Low-Voltage Distribution Network Monitoring

Smart Home and Building Automation

Solar PV and Energy Management

Companies Profiled:

HiSilicon Technologies Co., Ltd.

Shenzhen Leaguer Microelectronics Corp.

Qingdao Eastsoft Communication Technology Co., Ltd.

STMicroelectronics N.V.

Hi-trend Technology (Shanghai) Co., Ltd.

Qingdao Topscomm Communication Co., Ltd.

Microchip Technology Incorporated

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Renesas Electronics Corporation

Shanghai Belling Co., Ltd.

Analog Devices, Inc.

Semitech Semiconductor Pty Ltd.

Shenzhen Smart Chip Microelectronics Co., Ltd.

Chongqing Wuqi Microelectronics Co., Ltd.

Siliconductor Technology Co., Ltd.

Jiayuan Technology Co., Ltd.

SinoWealth Electronic Ltd.

Infineon Technologies AG

Yitran Technologies Ltd.

MegaChips Corporation

Texas Instruments Incorporated

Key Questions Answered

1. How big is the global BPSK Carrier Communication Chip market?
2. What is the demand of the global BPSK Carrier Communication Chip market?
3. What is the year over year growth of the global BPSK Carrier Communication Chip market?
4. What is the total value of the global BPSK Carrier Communication Chip market?
5. Who are the Major Players in the global BPSK Carrier Communication Chip market?
6. What are the growth factors driving the market demand?

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Contents

1 SUPPLY SUMMARY

1.1 BPSK Carrier Communication Chip Introduction
1.2 World BPSK Carrier Communication Chip Supply & Forecast
  1.2.1 World BPSK Carrier Communication Chip Production Value (2021 & 2025 & 2032)
  1.2.2 World BPSK Carrier Communication Chip Production (2021-2032)
  1.2.3 World BPSK Carrier Communication Chip Pricing Trends (2021-2032)
1.3 World BPSK Carrier Communication Chip Production by Region (Based on Production Site)
  1.3.1 World BPSK Carrier Communication Chip Production Value by Region (2021-2032)
  1.3.2 World BPSK Carrier Communication Chip Production by Region (2021-2032)
  1.3.3 World BPSK Carrier Communication Chip Average Price by Region (2021-2032)
  1.3.4 North America BPSK Carrier Communication Chip Production (2021-2032)
  1.3.5 Europe BPSK Carrier Communication Chip Production (2021-2032)
  1.3.6 China BPSK Carrier Communication Chip Production (2021-2032)
  1.3.7 Japan BPSK Carrier Communication Chip Production (2021-2032)
  1.3.8 South Korea BPSK Carrier Communication Chip Production (2021-2032)
1.4 Market Drivers, Restraints and Trends
  1.4.1 BPSK Carrier Communication Chip Market Drivers
  1.4.2 Factors Affecting Demand
  1.4.3 BPSK Carrier Communication Chip Major Market Trends

2 DEMAND SUMMARY

2.1 World BPSK Carrier Communication Chip Demand (2021-2032)
2.2 World BPSK Carrier Communication Chip Consumption by Region
  2.2.1 World BPSK Carrier Communication Chip Consumption by Region (2021-2026)
  2.2.2 World BPSK Carrier Communication Chip Consumption Forecast by Region (2027-2032)
2.3 United States BPSK Carrier Communication Chip Consumption (2021-2032)
2.4 China BPSK Carrier Communication Chip Consumption (2021-2032)
2.5 Europe BPSK Carrier Communication Chip Consumption (2021-2032)
2.6 Japan BPSK Carrier Communication Chip Consumption (2021-2032)
2.7 South Korea BPSK Carrier Communication Chip Consumption (2021-2032)
2.8 ASEAN BPSK Carrier Communication Chip Consumption (2021-2032)

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2.9 India BPSK Carrier Communication Chip Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World BPSK Carrier Communication Chip Production Value by Manufacturer (2021-2026)
3.2 World BPSK Carrier Communication Chip Production by Manufacturer (2021-2026)
3.3 World BPSK Carrier Communication Chip Average Price by Manufacturer (2021-2026)
3.4 BPSK Carrier Communication Chip Company Evaluation Quadrant
3.5 Industry Rank and Concentration Rate (CR)
  3.5.1 Global BPSK Carrier Communication Chip Industry Rank of Major Manufacturers
  3.5.2 Global Concentration Ratios (CR4) for BPSK Carrier Communication Chip in 2025
  3.5.3 Global Concentration Ratios (CR8) for BPSK Carrier Communication Chip in 2025
3.6 BPSK Carrier Communication Chip Market: Overall Company Footprint Analysis
  3.6.1 BPSK Carrier Communication Chip Market: Region Footprint
  3.6.2 BPSK Carrier Communication Chip Market: Company Product Type Footprint
  3.6.3 BPSK Carrier Communication Chip Market: Company Product Application Footprint
3.7 Competitive Environment
  3.7.1 Historical Structure of the Industry
  3.7.2 Barriers of Market Entry
  3.7.3 Factors of Competition
3.8 New Entrant and Capacity Expansion Plans
3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: BPSK Carrier Communication Chip Production Value Comparison
  4.1.1 United States VS China: BPSK Carrier Communication Chip Production Value Comparison (2021 & 2025 & 2032)
  4.1.2 United States VS China: BPSK Carrier Communication Chip Production Value Market Share Comparison (2021 & 2025 & 2032)
4.2 United States VS China: BPSK Carrier Communication Chip Production Comparison
  4.2.1 United States VS China: BPSK Carrier Communication Chip Production

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Comparison (2021 & 2025 & 2032)
4.2.2 United States VS China: BPSK Carrier Communication Chip Production Market Share Comparison (2021 & 2025 & 2032)
4.3 United States VS China: BPSK Carrier Communication Chip Consumption Comparison
4.3.1 United States VS China: BPSK Carrier Communication Chip Consumption Comparison (2021 & 2025 & 2032)
4.3.2 United States VS China: BPSK Carrier Communication Chip Consumption Market Share Comparison (2021 & 2025 & 2032)
4.4 United States Based BPSK Carrier Communication Chip Manufacturers and Market Share, 2021-2026
4.4.1 United States Based BPSK Carrier Communication Chip Manufacturers, Headquarters and Production Site (States, Country)
4.4.2 United States Based Manufacturers BPSK Carrier Communication Chip Production Value (2021-2026)
4.4.3 United States Based Manufacturers BPSK Carrier Communication Chip Production (2021-2026)
4.5 China Based BPSK Carrier Communication Chip Manufacturers and Market Share
4.5.1 China Based BPSK Carrier Communication Chip Manufacturers, Headquarters and Production Site (Province, Country)
4.5.2 China Based Manufacturers BPSK Carrier Communication Chip Production Value (2021-2026)
4.5.3 China Based Manufacturers BPSK Carrier Communication Chip Production (2021-2026)
4.6 Rest of World Based BPSK Carrier Communication Chip Manufacturers and Market Share, 2021-2026
4.6.1 Rest of World Based BPSK Carrier Communication Chip Manufacturers, Headquarters and Production Site (State, Country)
4.6.2 Rest of World Based Manufacturers BPSK Carrier Communication Chip Production Value (2021-2026)
4.6.3 Rest of World Based Manufacturers BPSK Carrier Communication Chip Production (2021-2026)

5 MARKET ANALYSIS BY FREQUENCY BAND

5.1 World BPSK Carrier Communication Chip Market Size Overview by Frequency Band: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Frequency Band
5.2.1 Below 150 kHz NB-PLC

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5.2.2 150 kHz–500 kHz NB-PLC
5.2.3 0.7 MHz–12 MHz HPLC
5.2.4 12 MHz–30 MHz Extended PLC
5.3 Market Segment by Frequency Band
5.3.1 World BPSK Carrier Communication Chip Production by Frequency Band (2021-2032)
5.3.2 World BPSK Carrier Communication Chip Production Value by Frequency Band (2021-2032)
5.3.3 World BPSK Carrier Communication Chip Average Price by Frequency Band (2021-2032)

6 MARKET ANALYSIS BY INTEGRATION LEVEL

6.1 World BPSK Carrier Communication Chip Market Size Overview by Integration Level: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Integration Level
6.2.1 Modem-Only PLC ICs
6.2.2 PLC SoC with MCU and Memory
6.2.3 PLC SoC with AFE / PA Companion
6.2.4 PLC+RF Dual-Mode SoC
6.2.5 Security-Enhanced PLC SoC
6.3 Market Segment by Integration Level
6.3.1 World BPSK Carrier Communication Chip Production by Integration Level (2021-2032)
6.3.2 World BPSK Carrier Communication Chip Production Value by Integration Level (2021-2032)
6.3.3 World BPSK Carrier Communication Chip Average Price by Integration Level (2021-2032)

7 MARKET ANALYSIS BY MODULATION AND PROTOCOL ARCHITECTURE

7.1 World BPSK Carrier Communication Chip Market Size Overview by Modulation and Protocol Architecture: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Modulation and Protocol Architecture
7.2.1 Legacy Single/Dual-Carrier BPSK PLC Chips
7.2.2 BPSK/DSS PLC Modem ICs
7.2.3 NB-PLC OFDM Chips with DBPSK/BPSK
7.2.4 HPLC Chips Supporting BPSK Modes
7.2.5 PLC+RF Dual-Mode Communication Chips

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7.3 Market Segment by Modulation and Protocol Architecture
7.3.1 World BPSK Carrier Communication Chip Production by Modulation and Protocol Architecture (2021-2032)
7.3.2 World BPSK Carrier Communication Chip Production Value by Modulation and Protocol Architecture (2021-2032)
7.3.3 World BPSK Carrier Communication Chip Average Price by Modulation and Protocol Architecture (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World BPSK Carrier Communication Chip Market Size Overview by Application: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Application
8.2.1 Smart Meter Communication Modules
8.2.2 AMI Concentrators and Collectors
8.2.3 Low-Voltage Distribution Network Monitoring
8.2.4 Smart Home and Building Automation
8.2.5 Solar PV and Energy Management
8.3 Market Segment by Application
8.3.1 World BPSK Carrier Communication Chip Production by Application (2021-2032)
8.3.2 World BPSK Carrier Communication Chip Production Value by Application (2021-2032)
8.3.3 World BPSK Carrier Communication Chip Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 HiSilicon Technologies Co., Ltd.
9.1.1 HiSilicon Technologies Co., Ltd. Details
9.1.2 HiSilicon Technologies Co., Ltd. Major Business
9.1.3 HiSilicon Technologies Co., Ltd. BPSK Carrier Communication Chip Product and Services
9.1.4 HiSilicon Technologies Co., Ltd. BPSK Carrier Communication Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.1.5 HiSilicon Technologies Co., Ltd. Recent Developments/Updates
9.1.6 HiSilicon Technologies Co., Ltd. Competitive Strengths & Weaknesses
9.2 Shenzhen Leaguer Microelectronics Corp.
9.2.1 Shenzhen Leaguer Microelectronics Corp. Details
9.2.2 Shenzhen Leaguer Microelectronics Corp. Major Business

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9.2.3 Shenzhen Leaguer Microelectronics Corp. BPSK Carrier Communication Chip Product and Services
9.2.4 Shenzhen Leaguer Microelectronics Corp. BPSK Carrier Communication Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.2.5 Shenzhen Leaguer Microelectronics Corp. Recent Developments/Updates
9.2.6 Shenzhen Leaguer Microelectronics Corp. Competitive Strengths & Weaknesses
9.3 Qingdao Eastsoft Communication Technology Co., Ltd.
9.3.1 Qingdao Eastsoft Communication Technology Co., Ltd. Details
9.3.2 Qingdao Eastsoft Communication Technology Co., Ltd. Major Business
9.3.3 Qingdao Eastsoft Communication Technology Co., Ltd. BPSK Carrier Communication Chip Product and Services
9.3.4 Qingdao Eastsoft Communication Technology Co., Ltd. BPSK Carrier Communication Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.3.5 Qingdao Eastsoft Communication Technology Co., Ltd. Recent Developments/Updates
9.3.6 Qingdao Eastsoft Communication Technology Co., Ltd. Competitive Strengths & Weaknesses
9.4 STMicroelectronics N.V.
9.4.1 STMicroelectronics N.V. Details
9.4.2 STMicroelectronics N.V. Major Business
9.4.3 STMicroelectronics N.V. BPSK Carrier Communication Chip Product and Services
9.4.4 STMicroelectronics N.V. BPSK Carrier Communication Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.4.5 STMicroelectronics N.V. Recent Developments/Updates
9.4.6 STMicroelectronics N.V. Competitive Strengths & Weaknesses
9.5 Hi-trend Technology (Shanghai) Co., Ltd.
9.5.1 Hi-trend Technology (Shanghai) Co., Ltd. Details
9.5.2 Hi-trend Technology (Shanghai) Co., Ltd. Major Business
9.5.3 Hi-trend Technology (Shanghai) Co., Ltd. BPSK Carrier Communication Chip Product and Services
9.5.4 Hi-trend Technology (Shanghai) Co., Ltd. BPSK Carrier Communication Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.5.5 Hi-trend Technology (Shanghai) Co., Ltd. Recent Developments/Updates
9.5.6 Hi-trend Technology (Shanghai) Co., Ltd. Competitive Strengths & Weaknesses
9.6 Qingdao Topscomm Communication Co., Ltd.
9.6.1 Qingdao Topscomm Communication Co., Ltd. Details
9.6.2 Qingdao Topscomm Communication Co., Ltd. Major Business

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9.6.3 Qingdao Topscomm Communication Co., Ltd. BPSK Carrier Communication Chip Product and Services
9.6.4 Qingdao Topscomm Communication Co., Ltd. BPSK Carrier Communication Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.6.5 Qingdao Topscomm Communication Co., Ltd. Recent Developments/Updates
9.6.6 Qingdao Topscomm Communication Co., Ltd. Competitive Strengths & Weaknesses
9.7 Microchip Technology Incorporated
9.7.1 Microchip Technology Incorporated Details
9.7.2 Microchip Technology Incorporated Major Business
9.7.3 Microchip Technology Incorporated BPSK Carrier Communication Chip Product and Services
9.7.4 Microchip Technology Incorporated BPSK Carrier Communication Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.7.5 Microchip Technology Incorporated Recent Developments/Updates
9.7.6 Microchip Technology Incorporated Competitive Strengths & Weaknesses
9.8 Renesas Electronics Corporation
9.8.1 Renesas Electronics Corporation Details
9.8.2 Renesas Electronics Corporation Major Business
9.8.3 Renesas Electronics Corporation BPSK Carrier Communication Chip Product and Services
9.8.4 Renesas Electronics Corporation BPSK Carrier Communication Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.8.5 Renesas Electronics Corporation Recent Developments/Updates
9.8.6 Renesas Electronics Corporation Competitive Strengths & Weaknesses
9.9 Shanghai Belling Co., Ltd.
9.9.1 Shanghai Belling Co., Ltd. Details
9.9.2 Shanghai Belling Co., Ltd. Major Business
9.9.3 Shanghai Belling Co., Ltd. BPSK Carrier Communication Chip Product and Services
9.9.4 Shanghai Belling Co., Ltd. BPSK Carrier Communication Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.9.5 Shanghai Belling Co., Ltd. Recent Developments/Updates
9.9.6 Shanghai Belling Co., Ltd. Competitive Strengths & Weaknesses
9.10 Analog Devices, Inc.
9.10.1 Analog Devices, Inc. Details
9.10.2 Analog Devices, Inc. Major Business
9.10.3 Analog Devices, Inc. BPSK Carrier Communication Chip Product and Services
9.10.4 Analog Devices, Inc. BPSK Carrier Communication Chip Production, Price,

+357 96 030922
info@marketpublishers.com

Value, Gross Margin and Market Share (2021-2026)
9.10.5 Analog Devices, Inc. Recent Developments/Updates
9.10.6 Analog Devices, Inc. Competitive Strengths & Weaknesses
9.11 Semitech Semiconductor Pty Ltd.
9.11.1 Semitech Semiconductor Pty Ltd. Details
9.11.2 Semitech Semiconductor Pty Ltd. Major Business
9.11.3 Semitech Semiconductor Pty Ltd. BPSK Carrier Communication Chip Product and Services
9.11.4 Semitech Semiconductor Pty Ltd. BPSK Carrier Communication Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.11.5 Semitech Semiconductor Pty Ltd. Recent Developments/Updates
9.11.6 Semitech Semiconductor Pty Ltd. Competitive Strengths & Weaknesses
9.12 Shenzhen Smart Chip Microelectronics Co., Ltd.
9.12.1 Shenzhen Smart Chip Microelectronics Co., Ltd. Details
9.12.2 Shenzhen Smart Chip Microelectronics Co., Ltd. Major Business
9.12.3 Shenzhen Smart Chip Microelectronics Co., Ltd. BPSK Carrier Communication Chip Product and Services
9.12.4 Shenzhen Smart Chip Microelectronics Co., Ltd. BPSK Carrier Communication Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.12.5 Shenzhen Smart Chip Microelectronics Co., Ltd. Recent Developments/Updates
9.12.6 Shenzhen Smart Chip Microelectronics Co., Ltd. Competitive Strengths & Weaknesses
9.13 Chongqing Wuqi Microelectronics Co., Ltd.
9.13.1 Chongqing Wuqi Microelectronics Co., Ltd. Details
9.13.2 Chongqing Wuqi Microelectronics Co., Ltd. Major Business
9.13.3 Chongqing Wuqi Microelectronics Co., Ltd. BPSK Carrier Communication Chip Product and Services
9.13.4 Chongqing Wuqi Microelectronics Co., Ltd. BPSK Carrier Communication Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.13.5 Chongqing Wuqi Microelectronics Co., Ltd. Recent Developments/Updates
9.13.6 Chongqing Wuqi Microelectronics Co., Ltd. Competitive Strengths & Weaknesses
9.14 Siliconductor Technology Co., Ltd.
9.14.1 Siliconductor Technology Co., Ltd. Details
9.14.2 Siliconductor Technology Co., Ltd. Major Business
9.14.3 Siliconductor Technology Co., Ltd. BPSK Carrier Communication Chip Product and Services
9.14.4 Siliconductor Technology Co., Ltd. BPSK Carrier Communication Chip

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Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.14.5 Siliconductor Technology Co., Ltd. Recent Developments/Updates
9.14.6 Siliconductor Technology Co., Ltd. Competitive Strengths & Weaknesses
9.15 Jiayuan Technology Co., Ltd.
9.15.1 Jiayuan Technology Co., Ltd. Details
9.15.2 Jiayuan Technology Co., Ltd. Major Business
9.15.3 Jiayuan Technology Co., Ltd. BPSK Carrier Communication Chip Product and Services
9.15.4 Jiayuan Technology Co., Ltd. BPSK Carrier Communication Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.15.5 Jiayuan Technology Co., Ltd. Recent Developments/Updates
9.15.6 Jiayuan Technology Co., Ltd. Competitive Strengths & Weaknesses
9.16 SinoWealth Electronic Ltd.
9.16.1 SinoWealth Electronic Ltd. Details
9.16.2 SinoWealth Electronic Ltd. Major Business
9.16.3 SinoWealth Electronic Ltd. BPSK Carrier Communication Chip Product and Services
9.16.4 SinoWealth Electronic Ltd. BPSK Carrier Communication Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.16.5 SinoWealth Electronic Ltd. Recent Developments/Updates
9.16.6 SinoWealth Electronic Ltd. Competitive Strengths & Weaknesses
9.17 Infineon Technologies AG
9.17.1 Infineon Technologies AG Details
9.17.2 Infineon Technologies AG Major Business
9.17.3 Infineon Technologies AG BPSK Carrier Communication Chip Product and Services
9.17.4 Infineon Technologies AG BPSK Carrier Communication Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.17.5 Infineon Technologies AG Recent Developments/Updates
9.17.6 Infineon Technologies AG Competitive Strengths & Weaknesses
9.18 Yitran Technologies Ltd.
9.18.1 Yitran Technologies Ltd. Details
9.18.2 Yitran Technologies Ltd. Major Business
9.18.3 Yitran Technologies Ltd. BPSK Carrier Communication Chip Product and Services
9.18.4 Yitran Technologies Ltd. BPSK Carrier Communication Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.18.5 Yitran Technologies Ltd. Recent Developments/Updates
9.18.6 Yitran Technologies Ltd. Competitive Strengths & Weaknesses

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9.19 MegaChips Corporation
9.19.1 MegaChips Corporation Details
9.19.2 MegaChips Corporation Major Business
9.19.3 MegaChips Corporation BPSK Carrier Communication Chip Product and Services
9.19.4 MegaChips Corporation BPSK Carrier Communication Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.19.5 MegaChips Corporation Recent Developments/Updates
9.19.6 MegaChips Corporation Competitive Strengths & Weaknesses
9.20 Texas Instruments Incorporated
9.20.1 Texas Instruments Incorporated Details
9.20.2 Texas Instruments Incorporated Major Business
9.20.3 Texas Instruments Incorporated BPSK Carrier Communication Chip Product and Services
9.20.4 Texas Instruments Incorporated BPSK Carrier Communication Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.20.5 Texas Instruments Incorporated Recent Developments/Updates
9.20.6 Texas Instruments Incorporated Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 BPSK Carrier Communication Chip Industry Chain
10.2 BPSK Carrier Communication Chip Upstream Analysis
10.2.1 BPSK Carrier Communication Chip Core Raw Materials
10.2.2 Main Manufacturers of BPSK Carrier Communication Chip Core Raw Materials
10.3 Midstream Analysis
10.4 Downstream Analysis
10.5 BPSK Carrier Communication Chip Production Mode
10.6 BPSK Carrier Communication Chip Procurement Model
10.7 BPSK Carrier Communication Chip Industry Sales Model and Sales Channels
10.7.1 BPSK Carrier Communication Chip Sales Model
10.7.2 BPSK Carrier Communication Chip Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology
12.2 Research Process and Data Source

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12.3 Disclaimer

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List Of Tables

LIST OF TABLES

Table 1. World BPSK Carrier Communication Chip Production Value by Region (2021, 2025 and 2032) & (USD Million)
Table 2. World BPSK Carrier Communication Chip Production Value by Region (2021-2026) & (USD Million)
Table 3. World BPSK Carrier Communication Chip Production Value by Region (2027-2032) & (USD Million)
Table 4. World BPSK Carrier Communication Chip Production Value Market Share by Region (2021-2026)
Table 5. World BPSK Carrier Communication Chip Production Value Market Share by Region (2027-2032)
Table 6. World BPSK Carrier Communication Chip Production by Region (2021-2026) & (Million Units)
Table 7. World BPSK Carrier Communication Chip Production by Region (2027-2032) & (Million Units)
Table 8. World BPSK Carrier Communication Chip Production Market Share by Region (2021-2026)
Table 9. World BPSK Carrier Communication Chip Production Market Share by Region (2027-2032)
Table 10. World BPSK Carrier Communication Chip Average Price by Region (2021-2026) & (US$/Unit)
Table 11. World BPSK Carrier Communication Chip Average Price by Region (2027-2032) & (US$/Unit)
Table 12. BPSK Carrier Communication Chip Major Market Trends
Table 13. World BPSK Carrier Communication Chip Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Million Units)
Table 14. World BPSK Carrier Communication Chip Consumption by Region (2021-2026) & (Million Units)
Table 15. World BPSK Carrier Communication Chip Consumption Forecast by Region (2027-2032) & (Million Units)
Table 16. World BPSK Carrier Communication Chip Production Value by Manufacturer (2021-2026) & (USD Million)
Table 17. Production Value Market Share of Key BPSK Carrier Communication Chip Producers in 2025
Table 18. World BPSK Carrier Communication Chip Production by Manufacturer (2021-2026) & (Million Units)

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Table 19. Production Market Share of Key BPSK Carrier Communication Chip Producers in 2025
Table 20. World BPSK Carrier Communication Chip Average Price by Manufacturer (2021-2026) & (US$/Unit)
Table 21. Global BPSK Carrier Communication Chip Company Evaluation Quadrant
Table 22. World BPSK Carrier Communication Chip Industry Rank of Major Manufacturers, Based on Production Value in 2025
Table 23. Head Office and BPSK Carrier Communication Chip Production Site of Key Manufacturer
Table 24. BPSK Carrier Communication Chip Market: Company Product Type Footprint
Table 25. BPSK Carrier Communication Chip Market: Company Product Application Footprint
Table 26. BPSK Carrier Communication Chip Competitive Factors
Table 27. BPSK Carrier Communication Chip New Entrant and Capacity Expansion Plans
Table 28. BPSK Carrier Communication Chip Mergers & Acquisitions Activity
Table 29. United States VS China BPSK Carrier Communication Chip Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 30. United States VS China BPSK Carrier Communication Chip Production Comparison, (2021 & 2025 & 2032) & (Million Units)
Table 31. United States VS China BPSK Carrier Communication Chip Consumption Comparison, (2021 & 2025 & 2032) & (Million Units)
Table 32. United States Based BPSK Carrier Communication Chip Manufacturers, Headquarters and Production Site (States, Country)
Table 33. United States Based Manufacturers BPSK Carrier Communication Chip Production Value, (2021-2026) & (USD Million)
Table 34. United States Based Manufacturers BPSK Carrier Communication Chip Production Value Market Share (2021-2026)
Table 35. United States Based Manufacturers BPSK Carrier Communication Chip Production (2021-2026) & (Million Units)
Table 36. United States Based Manufacturers BPSK Carrier Communication Chip Production Market Share (2021-2026)
Table 37. China Based BPSK Carrier Communication Chip Manufacturers, Headquarters and Production Site (Province, Country)
Table 38. China Based Manufacturers BPSK Carrier Communication Chip Production Value, (2021-2026) & (USD Million)
Table 39. China Based Manufacturers BPSK Carrier Communication Chip Production Value Market Share (2021-2026)
Table 40. China Based Manufacturers BPSK Carrier Communication Chip Production,

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(2021-2026) & (Million Units)
Table 41. China Based Manufacturers BPSK Carrier Communication Chip Production Market Share (2021-2026)
Table 42. Rest of World Based BPSK Carrier Communication Chip Manufacturers, Headquarters and Production Site (State, Country)
Table 43. Rest of World Based Manufacturers BPSK Carrier Communication Chip Production Value, (2021-2026) & (USD Million)
Table 44. Rest of World Based Manufacturers BPSK Carrier Communication Chip Production Value Market Share (2021-2026)
Table 45. Rest of World Based Manufacturers BPSK Carrier Communication Chip Production, (2021-2026) & (Million Units)
Table 46. Rest of World Based Manufacturers BPSK Carrier Communication Chip Production Market Share (2021-2026)
Table 47. World BPSK Carrier Communication Chip Production Value by Frequency Band, (USD Million), 2021 & 2025 & 2032
Table 48. World BPSK Carrier Communication Chip Production by Frequency Band (2021-2026) & (Million Units)
Table 49. World BPSK Carrier Communication Chip Production by Frequency Band (2027-2032) & (Million Units)
Table 50. World BPSK Carrier Communication Chip Production Value by Frequency Band (2021-2026) & (USD Million)
Table 51. World BPSK Carrier Communication Chip Production Value by Frequency Band (2027-2032) & (USD Million)
Table 52. World BPSK Carrier Communication Chip Average Price by Frequency Band (2021-2026) & (US$/Unit)
Table 53. World BPSK Carrier Communication Chip Average Price by Frequency Band (2027-2032) & (US$/Unit)
Table 54. World BPSK Carrier Communication Chip Production Value by Integration Level, (USD Million), 2021 & 2025 & 2032
Table 55. World BPSK Carrier Communication Chip Production by Integration Level (2021-2026) & (Million Units)
Table 56. World BPSK Carrier Communication Chip Production by Integration Level (2027-2032) & (Million Units)
Table 57. World BPSK Carrier Communication Chip Production Value by Integration Level (2021-2026) & (USD Million)
Table 58. World BPSK Carrier Communication Chip Production Value by Integration Level (2027-2032) & (USD Million)
Table 59. World BPSK Carrier Communication Chip Average Price by Integration Level (2021-2026) & (US$/Unit)

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Table 60. World BPSK Carrier Communication Chip Average Price by Integration Level (2027-2032) & (US$/Unit)
Table 61. World BPSK Carrier Communication Chip Production Value by Modulation and Protocol Architecture, (USD Million), 2021 & 2025 & 2032
Table 62. World BPSK Carrier Communication Chip Production by Modulation and Protocol Architecture (2021-2026) & (Million Units)
Table 63. World BPSK Carrier Communication Chip Production by Modulation and Protocol Architecture (2027-2032) & (Million Units)
Table 64. World BPSK Carrier Communication Chip Production Value by Modulation and Protocol Architecture (2021-2026) & (USD Million)
Table 65. World BPSK Carrier Communication Chip Production Value by Modulation and Protocol Architecture (2027-2032) & (USD Million)
Table 66. World BPSK Carrier Communication Chip Average Price by Modulation and Protocol Architecture (2021-2026) & (US$/Unit)
Table 67. World BPSK Carrier Communication Chip Average Price by Modulation and Protocol Architecture (2027-2032) & (US$/Unit)
Table 68. World BPSK Carrier Communication Chip Production Value by Application, (USD Million), 2021 & 2025 & 2032
Table 69. World BPSK Carrier Communication Chip Production by Application (2021-2026) & (Million Units)
Table 70. World BPSK Carrier Communication Chip Production by Application (2027-2032) & (Million Units)
Table 71. World BPSK Carrier Communication Chip Production Value by Application (2021-2026) & (USD Million)
Table 72. World BPSK Carrier Communication Chip Production Value by Application (2027-2032) & (USD Million)
Table 73. World BPSK Carrier Communication Chip Average Price by Application (2021-2026) & (US$/Unit)
Table 74. World BPSK Carrier Communication Chip Average Price by Application (2027-2032) & (US$/Unit)
Table 75. HiSilicon Technologies Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 76. HiSilicon Technologies Co., Ltd. Major Business
Table 77. HiSilicon Technologies Co., Ltd. BPSK Carrier Communication Chip Product and Services
Table 78. HiSilicon Technologies Co., Ltd. BPSK Carrier Communication Chip Production (Million Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 79. HiSilicon Technologies Co., Ltd. Recent Developments/Updates

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Table 80. HiSilicon Technologies Co., Ltd. Competitive Strengths & Weaknesses
Table 81. Shenzhen Leaguer Microelectronics Corp. Basic Information, Manufacturing Base and Competitors
Table 82. Shenzhen Leaguer Microelectronics Corp. Major Business
Table 83. Shenzhen Leaguer Microelectronics Corp. BPSK Carrier Communication Chip Product and Services
Table 84. Shenzhen Leaguer Microelectronics Corp. BPSK Carrier Communication Chip Production (Million Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 85. Shenzhen Leaguer Microelectronics Corp. Recent Developments/Updates
Table 86. Shenzhen Leaguer Microelectronics Corp. Competitive Strengths & Weaknesses
Table 87. Qingdao Eastsoft Communication Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 88. Qingdao Eastsoft Communication Technology Co., Ltd. Major Business
Table 89. Qingdao Eastsoft Communication Technology Co., Ltd. BPSK Carrier Communication Chip Product and Services
Table 90. Qingdao Eastsoft Communication Technology Co., Ltd. BPSK Carrier Communication Chip Production (Million Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 91. Qingdao Eastsoft Communication Technology Co., Ltd. Recent Developments/Updates
Table 92. Qingdao Eastsoft Communication Technology Co., Ltd. Competitive Strengths & Weaknesses
Table 93. STMicroelectronics N.V. Basic Information, Manufacturing Base and Competitors
Table 94. STMicroelectronics N.V. Major Business
Table 95. STMicroelectronics N.V. BPSK Carrier Communication Chip Product and Services
Table 96. STMicroelectronics N.V. BPSK Carrier Communication Chip Production (Million Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 97. STMicroelectronics N.V. Recent Developments/Updates
Table 98. STMicroelectronics N.V. Competitive Strengths & Weaknesses
Table 99. Hi-trend Technology (Shanghai) Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 100. Hi-trend Technology (Shanghai) Co., Ltd. Major Business
Table 101. Hi-trend Technology (Shanghai) Co., Ltd. BPSK Carrier Communication Chip Product and Services

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Table 102. Hi-trend Technology (Shanghai) Co., Ltd. BPSK Carrier Communication Chip Production (Million Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 103. Hi-trend Technology (Shanghai) Co., Ltd. Recent Developments/Updates
Table 104. Hi-trend Technology (Shanghai) Co., Ltd. Competitive Strengths & Weaknesses
Table 105. Qingdao Topscomm Communication Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 106. Qingdao Topscomm Communication Co., Ltd. Major Business
Table 107. Qingdao Topscomm Communication Co., Ltd. BPSK Carrier Communication Chip Product and Services
Table 108. Qingdao Topscomm Communication Co., Ltd. BPSK Carrier Communication Chip Production (Million Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 109. Qingdao Topscomm Communication Co., Ltd. Recent Developments/Updates
Table 110. Qingdao Topscomm Communication Co., Ltd. Competitive Strengths & Weaknesses
Table 111. Microchip Technology Incorporated Basic Information, Manufacturing Base and Competitors
Table 112. Microchip Technology Incorporated Major Business
Table 113. Microchip Technology Incorporated BPSK Carrier Communication Chip Product and Services
Table 114. Microchip Technology Incorporated BPSK Carrier Communication Chip Production (Million Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115. Microchip Technology Incorporated Recent Developments/Updates
Table 116. Microchip Technology Incorporated Competitive Strengths & Weaknesses
Table 117. Renesas Electronics Corporation Basic Information, Manufacturing Base and Competitors
Table 118. Renesas Electronics Corporation Major Business
Table 119. Renesas Electronics Corporation BPSK Carrier Communication Chip Product and Services
Table 120. Renesas Electronics Corporation BPSK Carrier Communication Chip Production (Million Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 121. Renesas Electronics Corporation Recent Developments/Updates
Table 122. Renesas Electronics Corporation Competitive Strengths & Weaknesses
Table 123. Shanghai Belling Co., Ltd. Basic Information, Manufacturing Base and

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Competitors
Table 124. Shanghai Belling Co., Ltd. Major Business
Table 125. Shanghai Belling Co., Ltd. BPSK Carrier Communication Chip Product and Services
Table 126. Shanghai Belling Co., Ltd. BPSK Carrier Communication Chip Production (Million Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 127. Shanghai Belling Co., Ltd. Recent Developments/Updates
Table 128. Shanghai Belling Co., Ltd. Competitive Strengths & Weaknesses
Table 129. Analog Devices, Inc. Basic Information, Manufacturing Base and Competitors
Table 130. Analog Devices, Inc. Major Business
Table 131. Analog Devices, Inc. BPSK Carrier Communication Chip Product and Services
Table 132. Analog Devices, Inc. BPSK Carrier Communication Chip Production (Million Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 133. Analog Devices, Inc. Recent Developments/Updates
Table 134. Analog Devices, Inc. Competitive Strengths & Weaknesses
Table 135. Semitech Semiconductor Pty Ltd. Basic Information, Manufacturing Base and Competitors
Table 136. Semitech Semiconductor Pty Ltd. Major Business
Table 137. Semitech Semiconductor Pty Ltd. BPSK Carrier Communication Chip Product and Services
Table 138. Semitech Semiconductor Pty Ltd. BPSK Carrier Communication Chip Production (Million Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 139. Semitech Semiconductor Pty Ltd. Recent Developments/Updates
Table 140. Semitech Semiconductor Pty Ltd. Competitive Strengths & Weaknesses
Table 141. Shenzhen Smart Chip Microelectronics Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 142. Shenzhen Smart Chip Microelectronics Co., Ltd. Major Business
Table 143. Shenzhen Smart Chip Microelectronics Co., Ltd. BPSK Carrier Communication Chip Product and Services
Table 144. Shenzhen Smart Chip Microelectronics Co., Ltd. BPSK Carrier Communication Chip Production (Million Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 145. Shenzhen Smart Chip Microelectronics Co., Ltd. Recent Developments/Updates

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Table 146. Shenzhen Smart Chip Microelectronics Co., Ltd. Competitive Strengths & Weaknesses
Table 147. Chongqing Wuqi Microelectronics Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 148. Chongqing Wuqi Microelectronics Co., Ltd. Major Business
Table 149. Chongqing Wuqi Microelectronics Co., Ltd. BPSK Carrier Communication Chip Product and Services
Table 150. Chongqing Wuqi Microelectronics Co., Ltd. BPSK Carrier Communication Chip Production (Million Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 151. Chongqing Wuqi Microelectronics Co., Ltd. Recent Developments/Updates
Table 152. Chongqing Wuqi Microelectronics Co., Ltd. Competitive Strengths & Weaknesses
Table 153. Siliconductor Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 154. Siliconductor Technology Co., Ltd. Major Business
Table 155. Siliconductor Technology Co., Ltd. BPSK Carrier Communication Chip Product and Services
Table 156. Siliconductor Technology Co., Ltd. BPSK Carrier Communication Chip Production (Million Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 157. Siliconductor Technology Co., Ltd. Recent Developments/Updates
Table 158. Siliconductor Technology Co., Ltd. Competitive Strengths & Weaknesses
Table 159. Jiayuan Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 160. Jiayuan Technology Co., Ltd. Major Business
Table 161. Jiayuan Technology Co., Ltd. BPSK Carrier Communication Chip Product and Services
Table 162. Jiayuan Technology Co., Ltd. BPSK Carrier Communication Chip Production (Million Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 163. Jiayuan Technology Co., Ltd. Recent Developments/Updates
Table 164. Jiayuan Technology Co., Ltd. Competitive Strengths & Weaknesses
Table 165. SinoWealth Electronic Ltd. Basic Information, Manufacturing Base and Competitors
Table 166. SinoWealth Electronic Ltd. Major Business
Table 167. SinoWealth Electronic Ltd. BPSK Carrier Communication Chip Product and Services
Table 168. SinoWealth Electronic Ltd. BPSK Carrier Communication Chip Production

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(Million Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 169. SinoWealth Electronic Ltd. Recent Developments/Updates
Table 170. SinoWealth Electronic Ltd. Competitive Strengths & Weaknesses
Table 171. Infineon Technologies AG Basic Information, Manufacturing Base and Competitors
Table 172. Infineon Technologies AG Major Business
Table 173. Infineon Technologies AG BPSK Carrier Communication Chip Product and Services
Table 174. Infineon Technologies AG BPSK Carrier Communication Chip Production (Million Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 175. Infineon Technologies AG Recent Developments/Updates
Table 176. Infineon Technologies AG Competitive Strengths & Weaknesses
Table 177. Yitran Technologies Ltd. Basic Information, Manufacturing Base and Competitors
Table 178. Yitran Technologies Ltd. Major Business
Table 179. Yitran Technologies Ltd. BPSK Carrier Communication Chip Product and Services
Table 180. Yitran Technologies Ltd. BPSK Carrier Communication Chip Production (Million Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 181. Yitran Technologies Ltd. Recent Developments/Updates
Table 182. Yitran Technologies Ltd. Competitive Strengths & Weaknesses
Table 183. MegaChips Corporation Basic Information, Manufacturing Base and Competitors
Table 184. MegaChips Corporation Major Business
Table 185. MegaChips Corporation BPSK Carrier Communication Chip Product and Services
Table 186. MegaChips Corporation BPSK Carrier Communication Chip Production (Million Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 187. MegaChips Corporation Recent Developments/Updates
Table 188. MegaChips Corporation Competitive Strengths & Weaknesses
Table 189. Texas Instruments Incorporated Basic Information, Manufacturing Base and Competitors
Table 190. Texas Instruments Incorporated Major Business
Table 191. Texas Instruments Incorporated BPSK Carrier Communication Chip Product and Services

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Table 192. Texas Instruments Incorporated BPSK Carrier Communication Chip Production (Million Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 193. Texas Instruments Incorporated Recent Developments/Updates
Table 194. Texas Instruments Incorporated Competitive Strengths & Weaknesses
Table 195. Global Key Players of BPSK Carrier Communication Chip Upstream (Raw Materials)
Table 196. Global BPSK Carrier Communication Chip Typical Customers
Table 197. BPSK Carrier Communication Chip Typical Distributors

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List Of Figures

LIST OF FIGURES

Figure 1. BPSK Carrier Communication Chip Picture
Figure 2. World BPSK Carrier Communication Chip Production Value: 2021 & 2025 & 2032, (USD Million)
Figure 3. World BPSK Carrier Communication Chip Production Value and Forecast (2021-2032) & (USD Million)
Figure 4. World BPSK Carrier Communication Chip Production (2021-2032) & (Million Units)
Figure 5. World BPSK Carrier Communication Chip Average Price (2021-2032) & (US$/Unit)
Figure 6. World BPSK Carrier Communication Chip Production Value Market Share by Region (2021-2032)
Figure 7. World BPSK Carrier Communication Chip Production Market Share by Region (2021-2032)
Figure 8. North America BPSK Carrier Communication Chip Production (2021-2032) & (Million Units)
Figure 9. Europe BPSK Carrier Communication Chip Production (2021-2032) & (Million Units)
Figure 10. China BPSK Carrier Communication Chip Production (2021-2032) & (Million Units)
Figure 11. Japan BPSK Carrier Communication Chip Production (2021-2032) & (Million Units)
Figure 12. South Korea BPSK Carrier Communication Chip Production (2021-2032) & (Million Units)
Figure 13. BPSK Carrier Communication Chip Market Drivers
Figure 14. Factors Affecting Demand
Figure 15. World BPSK Carrier Communication Chip Consumption (2021-2032) & (Million Units)
Figure 16. World BPSK Carrier Communication Chip Consumption Market Share by Region (2021-2032)
Figure 17. United States BPSK Carrier Communication Chip Consumption (2021-2032) & (Million Units)
Figure 18. China BPSK Carrier Communication Chip Consumption (2021-2032) & (Million Units)
Figure 19. Europe BPSK Carrier Communication Chip Consumption (2021-2032) & (Million Units)

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Figure 20. Japan BPSK Carrier Communication Chip Consumption (2021-2032) & (Million Units)
Figure 21. South Korea BPSK Carrier Communication Chip Consumption (2021-2032) & (Million Units)
Figure 22. ASEAN BPSK Carrier Communication Chip Consumption (2021-2032) & (Million Units)
Figure 23. India BPSK Carrier Communication Chip Consumption (2021-2032) & (Million Units)
Figure 24. Producer Shipments of BPSK Carrier Communication Chip by Manufacturer Revenue ($MM) and Market Share (%): 2025
Figure 25. Global Four-firm Concentration Ratios (CR4) for BPSK Carrier Communication Chip Markets in 2025
Figure 26. Global Four-firm Concentration Ratios (CR8) for BPSK Carrier Communication Chip Markets in 2025
Figure 27. United States VS China: BPSK Carrier Communication Chip Production Value Market Share Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: BPSK Carrier Communication Chip Production Market Share Comparison (2021 & 2025 & 2032)
Figure 29. United States VS China: BPSK Carrier Communication Chip Consumption Market Share Comparison (2021 & 2025 & 2032)
Figure 30. United States Based Manufacturers BPSK Carrier Communication Chip Production Market Share 2025
Figure 31. China Based Manufacturers BPSK Carrier Communication Chip Production Market Share 2025
Figure 32. Rest of World Based Manufacturers BPSK Carrier Communication Chip Production Market Share 2025
Figure 33. World BPSK Carrier Communication Chip Production Value by Frequency Band, (USD Million), 2021 & 2025 & 2032
Figure 34. World BPSK Carrier Communication Chip Production Value Market Share by Frequency Band in 2025
Figure 35. Below 150 kHz NB-PLC
Figure 36. 150 kHz–500 kHz NB-PLC
Figure 37. 0.7 MHz–12 MHz HPLC
Figure 38. 12 MHz–30 MHz Extended PLC
Figure 39. World BPSK Carrier Communication Chip Production Market Share by Frequency Band (2021-2032)
Figure 40. World BPSK Carrier Communication Chip Production Value Market Share by Frequency Band (2021-2032)
Figure 41. World BPSK Carrier Communication Chip Average Price by Frequency Band

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(2021-2032) & (US$/Unit)
Figure 42. World BPSK Carrier Communication Chip Production Value by Integration Level, (USD Million), 2021 & 2025 & 2032
Figure 43. World BPSK Carrier Communication Chip Production Value Market Share by Integration Level in 2025
Figure 44. Modem-Only PLC ICs
Figure 45. PLC SoC with MCU and Memory
Figure 46. PLC SoC with AFE / PA Companion
Figure 47. PLC+RF Dual-Mode SoC
Figure 48. Security-Enhanced PLC SoC
Figure 49. World BPSK Carrier Communication Chip Production Market Share by Integration Level (2021-2032)
Figure 50. World BPSK Carrier Communication Chip Production Value Market Share by Integration Level (2021-2032)
Figure 51. World BPSK Carrier Communication Chip Average Price by Integration Level (2021-2032) & (US$/Unit)
Figure 52. World BPSK Carrier Communication Chip Production Value by Modulation and Protocol Architecture, (USD Million), 2021 & 2025 & 2032
Figure 53. World BPSK Carrier Communication Chip Production Value Market Share by Modulation and Protocol Architecture in 2025
Figure 54. Legacy Single/Dual-Carrier BPSK PLC Chips
Figure 55. BPSK/DSS PLC Modem ICs
Figure 56. NB-PLC OFDM Chips with DBPSK/BPSK
Figure 57. HPLC Chips Supporting BPSK Modes
Figure 58. PLC+RF Dual-Mode Communication Chips
Figure 59. World BPSK Carrier Communication Chip Production Market Share by Modulation and Protocol Architecture (2021-2032)
Figure 60. World BPSK Carrier Communication Chip Production Value Market Share by Modulation and Protocol Architecture (2021-2032)
Figure 61. World BPSK Carrier Communication Chip Average Price by Modulation and Protocol Architecture (2021-2032) & (US$/Unit)
Figure 62. World BPSK Carrier Communication Chip Production Value by Application, (USD Million), 2021 & 2025 & 2032
Figure 63. World BPSK Carrier Communication Chip Production Value Market Share by Application in 2025
Figure 64. Smart Meter Communication Modules
Figure 65. AMI Concentrators and Collectors
Figure 66. Low-Voltage Distribution Network Monitoring
Figure 67. Smart Home and Building Automation

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Figure 68. Solar PV and Energy Management
Figure 69. World BPSK Carrier Communication Chip Production Market Share by Application (2021-2032)
Figure 70. World BPSK Carrier Communication Chip Production Value Market Share by Application (2021-2032)
Figure 71. World BPSK Carrier Communication Chip Average Price by Application (2021-2032) & (US$/Unit)
Figure 72. BPSK Carrier Communication Chip Industry Chain
Figure 73. BPSK Carrier Communication Chip Procurement Model
Figure 74. BPSK Carrier Communication Chip Sales Model
Figure 75. BPSK Carrier Communication Chip Sales Channels, Direct Sales, and Distribution
Figure 76. Methodology
Figure 77. Research Process and Data Source

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