

Global Cellular Baseband Processor Chipsets Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Cellular Baseband Processor Chipsets market size is expected to reach \$ 51150 million by 2032, rising at a market growth of 5.3% CAGR during the forecast period (2026-2032).

Cellular baseband processor chipsets are semiconductor products that execute the digital communications and protocol-processing functions required for a device to access cellular networks. Their core functions include physical-layer signal processing, channel coding and decoding, modulation and demodulation, carrier aggregation, MIMO processing, power and spectrum control, network attachment, mobility management, and voice and packet-data protocol handling. Products may be supplied as standalone cellular modems, modem subsystems integrated into mobile application-processor SoCs, cellular IoT SoCs, or highly integrated devices and SiPs combining the baseband with RF transceivers, power management, microcontrollers, GNSS, iSIM, security and application-processing resources. Key specifications include the supported 3GPP release and radio-access technologies, frequency bands, peak downlink and uplink rates, carrier-aggregation and antenna configurations, power consumption, process node, package size, voice capabilities and operator certifications. Principal applications include smartphones, feature phones, tablets, cellular PCs, fixed wireless access equipment, CPEs, mobile hotspots, automotive telematics, smart meters, industrial gateways, asset trackers, wearables and cellular-satellite converged devices.

Cellular baseband competition is shifting from basic network access toward system-level optimization across throughput, power efficiency, spectrum aggregation, global band support and terrestrial-satellite convergence. In premium devices, modem roadmaps are moving toward 5G-Advanced, AI-assisted traffic optimization, increasingly complex carrier aggregation, multi-frequency positioning and integrated NR-

NTN capabilities. In cellular IoT, NB-IoT, LTE-M, Cat 1bis, RedCap and eRedCap will coexist because their bandwidth, power, coverage, lifetime and regional network requirements differ materially. Standalone modems remain relevant in selected premium devices, fixed wireless access equipment and customizable platforms, but integration with application processors, RF transceivers, power-management devices, microcontrollers, GNSS, security and iSIM is becoming the dominant route for reducing power consumption, bill-of-material cost and development complexity. Recent products such as Qualcomm X105, Samsung Exynos Modem 5410, Apple C1X and the expanding range of RedCap and NTN chipsets demonstrate that technical innovation remains intensive even though the smartphone end market is mature.

Smartphones will continue to contribute the majority of industry revenue, but medium-term growth will be driven more by semiconductor value per device than by sustained handset unit expansion. Near-term smartphone demand is exposed to higher component costs, longer replacement cycles and pressure in entry-level price bands. These factors are partly offset by a richer mix of premium 5G and 5G-Advanced devices, FWA, automotive connectivity and cellular NTN. Cellular IoT will continue to generate strong unit demand from smart metering, tracking, payments, security, industrial gateways and consumer connected devices, although low-end chipset ASPs will remain under pressure. RedCap and eRedCap are likely to become more important from 2027 onward as operators and device makers seek a lower-complexity migration path from LTE, but adoption will depend on network deployment, module cost, band certification and replacement cycles. Vertical integration and regional supply-chain localization will remain the principal structural forces reshaping competition.

From the perspective of industry dynamics and future competition, the cellular baseband processor chipset market will continue to be shaped by vertical integration, platform consolidation, regional supply-chain localization and the rising cost of maintaining standards-compliant modem roadmaps. Large device manufacturers are increasingly strengthening in-house modem capabilities to improve control over power consumption, hardware-software integration, product differentiation and long-term component sourcing. This trend will gradually reduce the addressable merchant market in selected premium devices, while encouraging independent chipset suppliers to expand more aggressively into Android smartphones, fixed wireless access, automotive connectivity, cellular PCs, industrial IoT and satellite-enabled terminals. At the same time, smaller suppliers will face sustained pressure from high tape-out costs, operator certification requirements, protocol-stack maintenance and the need to support an expanding combination of terrestrial bands, carrier aggregation, RedCap and NTN functions. As a result, mergers, technology-asset transfers, strategic partnerships and

selective exits are likely to remain common across the industry. From the product-route perspective, competition will increasingly focus on 5G-Advanced readiness, AI-assisted modem optimization, lower power consumption, deeper integration of baseband, RF, GNSS, security and iSIM functions, and the ability to support both terrestrial cellular and satellite access. Regional policy support and domestic supply-chain programs will create additional opportunities for local suppliers, particularly in Cat.1 bis, NB-IoT, RedCap and industrial connectivity, but long-term competitiveness will still depend on product stability, software maturity, global operator certification and sustained customer deployment. The market is therefore unlikely to become broadly fragmented; instead, premium cellular platforms will remain highly concentrated, while cellular IoT and specialized connectivity will support a wider but more actively consolidating supplier base.

Report Scope

This report studies the global Cellular Baseband Processor Chipsets production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Cellular Baseband Processor Chipsets 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 Cellular Baseband Processor Chipsets that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Cellular Baseband Processor Chipsets total production and demand, 2021-2032, (Million Units)

Global Cellular Baseband Processor Chipsets total production value, 2021-2032, (USD Million)

Global Cellular Baseband Processor Chipsets production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Units), (based on production site)

Global Cellular Baseband Processor Chipsets consumption by region & country, CAGR, 2021-2032 & (Million Units)

U.S. VS China: Cellular Baseband Processor Chipsets domestic production, consumption, key domestic manufacturers and share

Global Cellular Baseband Processor Chipsets production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Units)

Global Cellular Baseband Processor Chipsets production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global Cellular Baseband Processor Chipsets production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global Cellular Baseband Processor Chipsets 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 Qualcomm Incorporated, MediaTek Inc., Samsung Electronics Co., Ltd., Huawei Investment & Holding Co., Ltd., Apple Inc., UNISOC (Shanghai) Technologies Co., Ltd., ASR Microelectronics Co., Ltd., Sony Group Corporation, Nordic Semiconductor ASA, Eigencomm Technologies Co., Ltd., 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 Cellular Baseband Processor Chipsets 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 Type, 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 Cellular Baseband Processor Chipsets Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Cellular Baseband Processor Chipsets Market, Segmentation by Type:

Standalone Baseband Modem

AP-Integrated Cellular SoC

Other

Global Cellular Baseband Processor Chipsets Market, Segmentation by Performance Tier:

Ultra-Low Throughput

Low-to-Mid Throughput

Broadband

High-Performance

Other

Global Cellular Baseband Processor Chipsets Market, Segmentation by Cellular-Satellite Capability:

Terrestrial Cellular Only

NB-NTN Enabled

NR-NTN Enabled

Other

Global Cellular Baseband Processor Chipsets Market, Segmentation by Spectrum Capability:

Sub-1 GHz Focused

Sub-6 GHz Multi-Band

Sub-6 GHz plus mmWave

Other

Global Cellular Baseband Processor Chipsets Market, Segmentation by Application:

FWA, CPE and Mobile Broadband

Automotive and Telematics

Industrial and Utility IoT

Tracking, Payment and Security

Wearables and Consumer IoT

Other

Companies Profiled:

Qualcomm Incorporated

MediaTek Inc.

Samsung Electronics Co., Ltd.

Huawei Investment & Holding Co., Ltd.

Apple Inc.

UNISOC (Shanghai) Technologies Co., Ltd.

ASR Microelectronics Co., Ltd.

Sony Group Corporation

Nordic Semiconductor ASA

Eigencomm Technologies Co., Ltd.

XINYI Technology Ltd.

Sequans Communications S.A.

GCT Semiconductor Holding, Inc.

Innobase

Guixin Technology (Shenzhen) Co., Ltd.

Beijing Mlink Technology Inc.

Key Questions Answered:

1. How big is the global Cellular Baseband Processor Chipsets market?
2. What is the demand of the global Cellular Baseband Processor Chipsets market?
3. What is the year over year growth of the global Cellular Baseband Processor Chipsets market?
4. What is the production and production value of the global Cellular Baseband Processor Chipsets market?
5. Who are the key producers in the global Cellular Baseband Processor Chipsets market?
6. What are the growth factors driving the market demand?

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