

# Global Cellular NAD Module Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Cellular NAD Module market size is expected to reach \$ 470 million by 2032, rising at a market growth of 3.6% CAGR during the forecast period (2026-2032).

Cellular NAD (Network Access Device) Module is a compact automotive-grade wireless communication module integrated into telematics control units (TCUs) to provide cellular connectivity for connected cars. It supports LTE/4G, 5G, GNSS, eSIM, eCall, V2X, OTA updates, vehicle diagnostics, cloud communication, and emergency services. NAD modules follow AEC-Q100/200 automotive standards, feature high heat/vibration resistance, and ensure reliable, long-term cellular communication between the vehicle and cloud platforms.

The industry chain for Cellular NAD Modules begins with upstream semiconductor suppliers producing chipsets, RF components, antennas, GNSS chips, baseband processors, and SIM/eSIM elements; continues through midstream NAD module manufacturers such as LG Innotek, ALPS ALPINE, Murata, Quectel, and Fibocom who conduct design, automotive-grade testing, assembly, and certification; and ends with downstream TCU integrators, automotive OEMs, smart-mobility operators, and cloud telematics platforms that embed NAD modules into connected vehicles for eCall, V2X, diagnostics, navigation, and OTA communication services.

Ongoing global projects include expansion of 5G automotive module production lines in Korea and Japan, new 5G C-V2X NAD module R&D hubs in China by Quectel and Fibocom, European OEM telematics upgrade programs transitioning from LTE to 5G, planned NAD integration into next-generation EV platforms for OTA-rich architectures, multi-country eCall compliance projects, and forthcoming automotive-grade 5G RedCap NAD modules scheduled for mass production between 2025 and 2028 to support cost-optimized connected-car deployments.

2025 Global Market sales Volume: 1.5 million unit, Average Global Market Price: USD 235 per unit, Market Average Gross Profit Margin: 22%.

The Cellular NAD Module market is expanding rapidly as global automotive OEMs accelerate adoption of connected-vehicle functions and transition toward software-defined vehicle architectures. High penetration of telematics control units, regulatory mandates such as eCall and ERA-GLONASS, and OEM demand for OTA updates are key growth drivers. 5G NAD modules are increasingly replacing LTE modules in higher-end EV and autonomous-driving platforms.

Regionally, China is becoming the largest production base due to strong supply chains and fast EV adoption, while Japan and Korea maintain leadership in high-reliability automotive electronics. Europe is driven by regulatory compliance and connected-car requirements, and North America sees strong demand for telematics-rich pickup trucks and mobility services.

Opportunities include the transition to 5G C-V2X, the adoption of RedCap modules, and integration of NAD modules into centralized vehicle compute systems. Risks include operator certification delays, fluctuating chipset supply, and geopolitical constraints affecting cross-border telecom hardware exports. Competition is intensifying among global module suppliers, with Korean and Japanese companies dominating premium OEMs, and Chinese companies scaling aggressively on volume. Pricing pressure remains strong for LTE modules, but 5G automotive-grade NAD modules maintain higher margins due to complexity and certification costs.

Overall, the sector is shifting from a hardware-only model to integrated hardware-software telematics stacks, improving differentiation and long-term market stability.

This report studies the global Cellular NAD Module production, demand, key manufacturers, and key regions.

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

### **Highlights and key features of the study**

Global Cellular NAD Module total production and demand, 2021-2032, (K Units)

Global Cellular NAD Module total production value, 2021-2032, (USD Million)

Global Cellular NAD Module production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Cellular NAD Module consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Cellular NAD Module domestic production, consumption, key domestic manufacturers and share

Global Cellular NAD Module production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Cellular NAD Module production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Cellular NAD Module production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Cellular NAD Module 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 Aumovio (Continental AG), LG Innotek, ALPS ALPINE CO., LTD, Quectel, Favalon (Fibocom), U-Blox, Sunsea AIoT, Kontron, Harman, WNC, 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 NAD Module market

**Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K 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 NAD Module Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

### Global Cellular NAD Module Market, Segmentation by Type:

4G Module

5G Module

Others

### Global Cellular NAD Module Market, Segmentation by Integration Level:

Standalone

Integrated

### Global Cellular NAD Module Market, Segmentation by Grade:

AEC-Q100/Q200 Certified

ISO 26262 Functional Safety Module

TS16949 / IATF16949 Automotive-Grade Module

Others

### Global Cellular NAD Module Market, Segmentation by Application:

Connected Vehicle Communication

TCU (Telematics Control Unit) Integration

Emergency System

Others

### **Companies Profiled:**

Aumovio (Continental AG)

LG Innotek

ALPS ALPINE CO., LTD

Quectel

Favalon (Fibocom)

U-Blox

Sunsea AIoT

Kontron

Harman

WNC

**Key Questions Answered:**

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

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