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Global NB-IoT Modem Chip Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global NB-IoT Modem Chip market size is expected to reach $ 804 million by 2032, rising at a market growth of 8.0% CAGR during the forecast period (2026-2032).

NB-IoT Modem Chip refers to a semiconductor device or chipset designed to implement 3GPP Narrowband Internet of Things radio access, baseband processing, protocol control and radio-frequency communication functions for low-power wide-area cellular devices. The market primarily covers standalone modem chipsets, RF-baseband integrated SoCs, modem SoCs with embedded application processors and semiconductor-grade system-in-package products. These devices typically support Cat-NB1 or Cat-NB2 operation over an approximately 180 kHz carrier and may operate through standalone, LTE guard-band or in-band network deployment. Key product parameters include supported frequency bands, 3GPP release, receiver sensitivity, transmit power, PSM and eDRX current consumption, memory resources, host interfaces, security capability, operating temperature and operator certification. More integrated products may incorporate power management, application MCUs, GNSS, secure elements, eSIM or iSIM functions and non-terrestrial network capability. NB-IoT Modem Chip products are mainly used in smart metering, smart-city sensing, fire and safety equipment, industrial monitoring, asset tracking, agriculture, environmental monitoring and other applications requiring low data rates, extended coverage, high connection density and multi-year battery operation. NB-IoT was standardized by 3GPP in Release 13 and has subsequently evolved through later releases, including support for NB-IoT over non-terrestrial networks in Release 17.

Key Findings

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2025 global shipments were approximately 270 million units

The weighted average selling price was approximately US$1.70 per unit

China remained the largest production and application market

Single-mode products led unit shipments while smart metering remained the largest application

Market Trends

NB-IoT Modem Chip development is shifting from basic connectivity toward lower system power, higher functional integration and wider network adaptability. Single-mode products remain the principal volume platform for highly cost-sensitive and stationary devices, while LTE-M and NB-IoT dual-mode products, application-processor-integrated SoCs and semiconductor-grade SiPs are gaining importance in globally deployed equipment. Product upgrades increasingly combine modem, RF transceiver, power management, memory, security, positioning and application processing in a smaller package, reducing external component count and simplifying terminal design. Newer chipsets also place greater emphasis on secure boot, trusted execution, eSIM or iSIM support, edge processing and indoor or outdoor positioning. Release 17 non-terrestrial network capability is extending the technology roadmap beyond terrestrial coverage, particularly for logistics, agriculture, remote infrastructure and environmental monitoring. The longer-term direction is therefore not defined solely by lower chip prices, but by the ability to reduce total device cost, certification effort, power consumption and deployment complexity. 3GPP has incorporated NB-IoT and eMTC satellite access into the Release 17 framework, while current commercial semiconductor platforms increasingly combine terrestrial NB-IoT, LTE-M, GNSS, security and NTN functions.

Market Dynamics

Drivers

Demand is supported by continued digitization of utility infrastructure, large-scale smart-meter replacement, expansion of municipal sensing systems and the need to migrate low-data-rate devices from legacy 2G and 3G networks. NB-IoT offers licensed-spectrum operation, operator-managed security, extended indoor coverage and long

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battery life, making it suitable for devices that transmit small data packets over long operating cycles. The global network foundation is already extensive: GSMA recorded 140 commercial NB-IoT networks by November 2025, while active NB-IoT and LTE-M connections together reached one billion at the end of 2025. This installed base supports continued demand for replacement chips, new module designs and application-specific platforms. Semiconductor integration is also improving project economics by reducing memory, RF, power-management and external MCU requirements, allowing terminal manufacturers to lower bill-of-materials cost and shorten hardware development cycles.

Restraints

The market faces persistent average selling price pressure, particularly in high-volume single-mode products used in smart metering and basic sensing. Long product qualification cycles, operator certification requirements, patent licensing, regional band differences and fragmented network configurations raise development costs and delay customer adoption. Demand can also be affected by inventory movements between chipset suppliers, module manufacturers and device producers, creating a gap between semiconductor shipments and activated connections. Alternative cellular technologies impose additional pressure. LTE Cat.1 bis offers higher throughput and mobility for devices that can accept higher power consumption, while LTE-M remains more attractive in some international markets requiring mobility, voice or broader roaming support. 5G RedCap is expected to address higher-performance IoT applications over time. NB-IoT Modem Chip suppliers must therefore maintain a sufficiently low total device cost and clearly differentiated performance in deep coverage, low-frequency transmission and long battery life.

Opportunities

The strongest opportunities are concentrated in application-specific integration, emerging-market infrastructure and terrestrial–satellite connectivity. Smart water, gas and electricity meters continue to offer substantial replacement and new-installation demand, while fire alarms, environmental sensors and municipal infrastructure create opportunities for optimized single-mode SoCs. In internationally deployed equipment, suppliers can capture higher semiconductor value by integrating dual-mode connectivity, GNSS, security, application processing and global band support. Release 17 NB-IoT NTN creates an additional pathway for connecting assets and sensors beyond terrestrial network coverage, including agricultural equipment, logistics assets,

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pipelines, remote energy infrastructure and environmental monitoring stations. Opportunities also exist in markets where 2G and 3G retirement requires redesign of low-data-rate devices, provided that chipset and module suppliers can achieve local operator certification and stable long-term supply. The expansion of NB-IoT from a standalone communication function toward an integrated low-power computing and connectivity platform can support higher value per device even as basic modem prices remain under pressure.

Challenges

The principal challenge is maintaining sustainable semiconductor economics in a market characterized by long development cycles, substantial protocol and RF engineering requirements and strong price competition. A commercially successful NB-IoT Modem Chip requires baseband expertise, RF integration, protocol-stack maturity, operator interoperability, certification resources and access to stable wafer and packaging capacity. Smaller suppliers may achieve technical validation but still encounter difficulty obtaining sufficient shipment scale to recover research, mask, software-maintenance and certification costs. The coexistence of single-mode, dual-mode, multi-mode and NTN products also increases portfolio complexity and can fragment engineering investment. Corporate acquisitions, intellectual-property transfers and business divestments may strengthen technology platforms but can create uncertainty over product continuity and customer support. Suppliers must additionally manage long industrial product lifecycles, regional security requirements and customer expectations for multi-year availability. These factors favor companies with either significant shipment volume in cost-sensitive applications or differentiated platforms capable of commanding higher value through integration, certification and global deployment support.

Industry Chain Analysis

The upstream NB-IoT Modem Chip industry chain comprises cellular communication intellectual property, processor and security IP, EDA tools, semiconductor materials, wafer fabrication, RF components, memory and outsourced packaging and testing. Most specialist suppliers operate under a fabless model and depend on external foundries and assembly partners, while integrated device manufacturers may combine internal manufacturing with outsourced capacity. Upstream cost is influenced by process technology, die area, embedded memory, RF integration, package complexity,

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testing requirements and production volume. Although advanced process nodes are not always essential, power efficiency, RF performance and cost control require close coordination among architecture, process and packaging design.

The midstream segment consists of modem chipset, integrated SoC and semiconductor-grade SiP developers. Value creation is concentrated in protocol-stack maturity, baseband and RF integration, low-power architecture, security, band coverage, certification and software tools. Downstream participants integrate these products into communication modules, smart meters, trackers, industrial sensors and other connected devices before deployment through utilities, operators, equipment manufacturers and system integrators. Semiconductor suppliers with higher integration can capture more value by replacing external MCUs, memory, power-management devices or positioning chips, but they also carry greater development and certification costs. In high-volume single-mode products, profitability depends primarily on die cost, yield, packaging efficiency and shipment scale; in global dual-mode and SiP products, certification coverage, software support and functional integration have a greater influence on pricing.

Segment Insights

By cellular mode, single-mode NB-IoT products account for the majority of unit shipments because they offer the lowest communication cost for stationary, low-throughput and battery-powered devices. Their market position is particularly strong in smart meters, safety sensors and municipal monitoring equipment. LTE-M and NB-IoT dual-mode products represent a smaller volume segment but generally carry higher semiconductor value because they provide broader operator compatibility, mobility support and international deployment flexibility. Multi-mode products supporting NB-IoT together with 2G or broader LTE categories serve applications requiring migration flexibility or more complex communication behavior.

By product type, integrated modem SoCs form the mainstream architecture, as integration of RF, baseband, memory and power management reduces external bill of materials and device size. SoCs with application processing and semiconductor-grade SiPs represent a higher-value development direction, especially where customers require positioning, security, edge processing or simplified certification. By application, smart metering remains the largest demand category, supported by large device populations, long replacement cycles and standardized low-data-rate communication requirements. Asset tracking, industrial monitoring and NTN-enabled remote sensing

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provide stronger opportunities for higher-value dual-mode and integrated products rather than basic single-mode chips.

Downstream Market Opportunities

Smart metering remains the most important downstream opportunity because water, gas and electricity meters combine long field life, low reporting frequency, deep indoor installation and large deployment volumes. Future demand will increasingly come from replacement cycles, utility digitalization and migration from older cellular networks rather than only first-time connectivity. Smart-city safety devices and environmental sensors offer additional scale for low-cost single-mode chips, while industrial monitoring and asset tracking support greater value per device through positioning, security and application processing. Remote agriculture, logistics and energy infrastructure are emerging opportunities for NB-IoT NTN, particularly where terrestrial cellular coverage is intermittent or unavailable. Suppliers that provide stable long-term availability, local certification, reference designs and integrated software can improve their position in these applications because downstream customers generally prioritize battery life, deployment reliability and lifecycle cost over peak data speed.

Regional Insights

China is the largest production and application market for NB-IoT Modem Chip products, supported by a dense domestic ecosystem covering chip design, wafer and packaging services, communication modules, smart-meter manufacturing, operators and municipal IoT projects. The region has the strongest position in high-volume single-mode devices and therefore exerts significant influence on global unit pricing. North America, Europe, Israel and Japan account for a smaller share of unit shipments but have a stronger presence in globally certified LTE-M and NB-IoT dual-mode platforms, highly integrated SoCs, SiPs, positioning and security functions. These products typically address industrial, tracking and multinational deployments where broader band support and software ecosystems are more important than minimum chip price.

India represents an important emerging opportunity, led by smart-meter programs, infrastructure digitalization and local electronics development, although chipset supply remains substantially dependent on international semiconductor platforms. Southeast Asia plays a growing role in packaging, module production and connected-device manufacturing but has limited independent NB-IoT modem IP. Future regional

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competition will therefore remain differentiated: China will lead cost-sensitive volume applications, while international suppliers will concentrate on global certification, high integration, dual-mode connectivity and NTN-enabled use cases.

Competitive Landscape Analysis

The competitive landscape consists of 16 confirmed core corporate groups and independent suppliers, with a clear separation between high-volume single-mode vendors and globally oriented integrated-platform companies. Chinese suppliers such as Huawei, UNISOC, XINYI, Eigencomm, ASR and other specialist developers compete primarily through cost optimization, local network adaptation, module partnerships and access to large smart-meter and municipal projects. International companies including Qualcomm, Sony, MediaTek, Nordic, Sequans and GCT place greater emphasis on multi-region certification, LTE-M and NB-IoT coexistence, global frequency support, integrated positioning, security and application processing. Semiconductor-grade SiP suppliers further differentiate through reduced terminal size and simplified RF design.

Competition is not determined by company size alone. Specialist suppliers can hold meaningful positions in narrow applications through power consumption, chip cost or software optimization, while larger semiconductor groups benefit from stronger intellectual-property portfolios, certification resources and broader customer support. Technology acquisitions and cellular-business transfers indicate continued consolidation, as long development cycles and declining basic-chip prices make independent scale increasingly important. Future competitive advantage will depend on maintaining low total device cost in single-mode applications while extending product value through dual-mode connectivity, security, positioning, embedded processing and NTN capability. The market is therefore likely to remain concentrated, with distinct volume and premium-platform segments rather than converging toward a single uniform product structure.

Report Scope

This report studies the global NB-IoT Modem Chip production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for NB-IoT Modem Chip and provides market size (US$ million) and Year-over-Year (YoY) Growth,

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considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of NB-IoT Modem Chip that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global NB-IoT Modem Chip total production and demand, 2021-2032, (Million Units)

Global NB-IoT Modem Chip total production value, 2021-2032, (USD Million)

Global NB-IoT Modem Chip production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Units), (based on production site)

Global NB-IoT Modem Chip consumption by region & country, CAGR, 2021-2032 & (Million Units)

U.S. VS China: NB-IoT Modem Chip domestic production, consumption, key domestic manufacturers and share

Global NB-IoT Modem Chip production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Units)

Global NB-IoT Modem Chip production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global NB-IoT Modem Chip production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global NB-IoT Modem 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 Huawei Technologies Co., Ltd., Qualcomm Incorporated, Sony Group Corporation, China Mobile Communications Group Co., Ltd., MediaTek Inc., Renesas Electronics Corporation, UNISOC (Shanghai) Technologies Co., Ltd., Nordic Semiconductor ASA, Skyworks Solutions, Inc., ASR Microelectronics Co., Ltd., etc.

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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 NB-IoT Modem 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 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 NB-IoT Modem Chip Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global NB-IoT Modem Chip Market, Segmentation by Type:

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Standalone Modem Chipset

Integrated Modem SoC

Modem SoC with Application MCU

Semiconductor-Grade SiP

Global NB-IoT Modem Chip Market, Segmentation by Cellular Mode Support:

Single-Mode NB-IoT

LTE-M / NB-IoT Dual-Mode

2G / NB-IoT Multi-Mode

Broadband LTE / NB-IoT Multi-Mode

Other

Global NB-IoT Modem Chip Market, Segmentation by Power Consumption Class:

Ultra-Low-Power Battery Class

Low-Power General Class

Performance-Oriented Class

Other

Global NB-IoT Modem Chip Market, Segmentation by 3GPP Release Generation:

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Release 13 Generation

Release 14 Generation

Release 15–16 Generation

Release 17 and Later Generation

Global NB-IoT Modem Chip Market, Segmentation by Application:

Smart Metering

Smart City Sensing

Industrial Monitoring

Asset Tracking

Agriculture and Environmental Monitoring

Smart Home and Safety Devices

Other Applications

Companies Profiled:

Huawei Technologies Co., Ltd.

Qualcomm Incorporated

Sony Group Corporation

China Mobile Communications Group Co., Ltd.

MediaTek Inc.

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Renesas Electronics Corporation

UNISOC (Shanghai) Technologies Co., Ltd.

Nordic Semiconductor ASA

Skyworks Solutions, Inc.

ASR Microelectronics Co., Ltd.

Sequans Communications S.A.

GCT Semiconductor, Inc.

XINYI Information Technology (Shanghai) Co., Ltd.

Eigencomm

Trasna

Beijing Mlink Technology Inc.

Key Questions Answered

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

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