

# Global RF-System-on-a-Chip (RF-SoC) Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global RF-System-on-a-Chip (RF-SoC) market size is expected to reach \$ 1818 million by 2032, rising at a market growth of 4.1% CAGR during the forecast period (2026-2032).

An RF System-on-a-Chip (RF-SoC) is a highly integrated semiconductor device that combines RF front-end components, baseband processing, high-speed data converters (ADC/DAC), and digital signal processing units on a single chip. RF-SoCs enable direct acquisition, conversion, processing, and transmission of RF signals while reducing system size, power consumption, and design complexity. They are widely used in communication infrastructure, radar systems, test and measurement, and high-frequency data acquisition applications.

The production volume of RF system-on-a-chip was 771,000 units in 2025, with an average price of \$1,730 per unit.

From an industry chain perspective, upstream mainly consists of advanced wafer fabrication, RF and mixed-signal IP licensing, EDA design tools, RF materials, and advanced packaging and testing services. High-performance CMOS and SiGe BiCMOS process platforms are critical for high-frequency performance and power efficiency, while advanced packaging technologies directly affect multi-channel synchronization capability and thermal management. The upstream segment is relatively concentrated and highly dependent on advanced process nodes and RF design expertise.

Downstream applications represent the core value realization of RF-SoC products and are primarily concentrated in mobile communication infrastructure, radar and wireless sensing systems, satellite communications and aerospace systems, defense

electronics, and test and measurement equipment. Communication base stations, particularly for 5G and future 6G networks, constitute the largest demand source, driving continuous upgrades toward higher bandwidth, multi-channel integration, and lower power consumption. Millimeter-wave radar and intelligent transportation systems are experiencing rapid growth in demand for highly integrated high-frequency chips. Defense and aerospace markets feature high technical barriers and long certification cycles but offer the strongest profitability. The test and measurement segment is relatively stable, emphasizing precision and long-term supply capability. Overall, downstream markets are characterized by high technical standards, relatively concentrated customers, and long product life cycles.

Industry trends focus on higher frequency support, greater integration, and platform-based architectures. The expansion of millimeter-wave and higher-frequency applications is accelerating, with deeper convergence between RF and digital processing and increasing adoption of software-defined radio architectures. Key growth drivers include global mobile network upgrades, development of intelligent radar and autonomous driving systems, rising defense digitalization demand, and system miniaturization. Major constraints include high R&D investment, complex design and validation processes, volatility in advanced process costs, and intensifying price competition in certain segments.

In terms of profitability, RF-SoC products maintain relatively high gross margins across the industry. Communication infrastructure products typically achieve margins of 50% to 70%, defense and aerospace applications can reach 60% to above 80%, industrial and test and measurement products range from 45% to 65%, and general or lower-end products range from 35% to 50%. The overall industry weighted average gross margin is approximately 50% to 65%, reflecting strong technological premium capability, while remaining sensitive to wafer cost fluctuations and competitive dynamics.

This report studies the global RF-System-on-a-Chip (RF-SoC) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for RF-System-on-a-Chip (RF-SoC) 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 RF-System-on-a-Chip (RF-SoC) that contribute to its increasing demand across many markets.

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

Global RF-System-on-a-Chip (RF-SoC) total production and demand, 2021-2032, (K Units)

Global RF-System-on-a-Chip (RF-SoC) total production value, 2021-2032, (USD Million)

Global RF-System-on-a-Chip (RF-SoC) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global RF-System-on-a-Chip (RF-SoC) consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: RF-System-on-a-Chip (RF-SoC) domestic production, consumption, key domestic manufacturers and share

Global RF-System-on-a-Chip (RF-SoC) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global RF-System-on-a-Chip (RF-SoC) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global RF-System-on-a-Chip (RF-SoC) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global RF-System-on-a-Chip (RF-SoC) 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 Broadcom, Qualcomm, MediaTek, Samsung, NXP, Infineon, Texas Instruments, STMicroelectronics, Renesas, Analog Devices, 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 RF-System-on-a-Chip (RF-SoC) 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 RF-System-on-a-Chip (RF-SoC) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global RF-System-on-a-Chip (RF-SoC) Market, Segmentation by Type:

RF Front-End Integrated

ADC/DAC Integrated

Full Signal-Chain Integrated

Global RF-System-on-a-Chip (RF-SoC) Market, Segmentation by Frequency Range:

Sub-6 GHz

6-18 GHz

Millimeter Wave (More than 24 GHz)

Global RF-System-on-a-Chip (RF-SoC) Market, Segmentation by Data Conversion Performance:

12-bit

14-bit

16-bit

### Global RF-System-on-a-Chip (RF-SoC) Market, Segmentation by Application:

5G And 6G Communication Base Stations

Software-Defined Radio Systems

Phased Array Radar Systems

Electronic Warfare And Defense Electronics

Test And Measurement Equipment

### Companies Profiled:

Broadcom

Qualcomm

MediaTek

Samsung

NXP

Infineon

Texas Instruments

STMicroelectronics

Renesas

Analog Devices

Synaptics

Qorvo

Realtek

Microchip

Silicon Labs

Nordic Semiconductor

Espressif

Telink Semiconductor

Huawei HiSilicon

Unisoc

Calterah

ASR Microelectronics

### **Key Questions Answered:**

1. How big is the global RF-System-on-a-Chip (RF-SoC) market?
2. What is the demand of the global RF-System-on-a-Chip (RF-SoC) market?
3. What is the year over year growth of the global RF-System-on-a-Chip (RF-SoC) market?
4. What is the production and production value of the global RF-System-on-a-Chip (RF-SoC) market?
5. Who are the key producers in the global RF-System-on-a-Chip (RF-SoC) market?
6. What are the growth factors driving the market demand?

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