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Global V2X Communication Chip Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global V2X Communication Chip market size is expected to reach $ 677 million by 2032, rising at a market growth of 19.1% CAGR during the forecast period (2026-2032).

A V2X Communication Chip is an automotive-grade semiconductor device or chipset designed to implement direct, low-latency and highly reliable wireless communication among vehicles, roadside infrastructure, vulnerable road users and connected transportation systems. The research scope focuses on devices that perform V2X physical-layer, medium-access-control, baseband, modulation, coding, synchronization, resource-selection and radio-interface functions. Principal product forms comprise standalone V2X baseband chips, modem ASICs, RF-baseband chipsets, dedicated V2X system-on-chips and automotive connectivity processors integrating cellular and V2X functions. The supported technology families primarily include IEEE 802.11p, DSRC, WAVE, ITS-G5, LTE-V2X PC5 and NR-V2X PC5. Important product characteristics include operation in designated intelligent-transport frequencies such as the 5.9 GHz band, automotive qualification, low communication latency, high packet-delivery reliability, interference management, security interfaces, multi-antenna capability and integration with GNSS, host processors and in-vehicle networks. V2X Communication Chip products enable collision warning, road-hazard notification, traffic-signal information, vulnerable-road-user protection, cooperative perception, platooning and cooperative driving applications.

Key Findings

2025 equivalent shipments were estimated at approximately 6.2 million units with a weighted ASP near US$30

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Seven parent-level suppliers satisfy the formal production criteria for V2X Communication Chip

LTE-V2X remained the largest commercial technology segment while NR-V2X was still at an early commercialization stage

Integrated cellular and V2X SoCs are becoming the principal product upgrade direction

China leads new C-V2X deployment activity while Europe retains a meaningful legacy ITS-G5 installed base

Market Trends

The V2X Communication Chip market is moving from single-standard, standalone communication devices toward integrated and upgradeable automotive connectivity platforms. LTE-V2X remains the principal cellular route in commercial deployments, while NR-V2X is extending the technology toward higher-reliability cooperative driving, sensor-information sharing and more complex sidelink services. Product development is increasingly combining V2X direct communication with 4G or 5G cellular connectivity, GNSS, security processing and application-control functions in a single chipset or system-on-chip. This integration reduces module size and system complexity while enabling automotive manufacturers to reuse a common connectivity platform across multiple vehicle programs. IEEE 802.11p, DSRC and ITS-G5 products continue to serve established programs, making multi-standard support and migration capability commercially important. Over the longer term, market differentiation will increasingly depend on software-defined radio functions, standards evolution, cybersecurity, interoperability, power efficiency and the ability to coordinate V2X information with onboard sensing and advanced driver-assistance systems.

Market Dynamics

Drivers

Growth is being driven by the need to improve road safety beyond the line-of-sight limitations of cameras and radar, as well as by government-led deployment of

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connected-road infrastructure. China’s vehicle-road-cloud integration program requires participating areas to expand C-V2X infrastructure, improve onboard-terminal installation and develop interoperable city-level systems during the 2024–2026 pilot period. The United States has also established a national V2X deployment plan and funded interoperable connected-vehicle projects. These initiatives are expanding the addressable demand for vehicle-side and roadside communication chips, while vehicle manufacturers are increasingly evaluating V2X as a complementary data source for driver assistance, cooperative perception and automated-driving functions. Continued standard development under 3GPP further supports investment in platforms that can evolve from LTE-V2X toward NR-V2X.

Restraints

The market remains constrained by the interdependence between vehicle penetration and roadside-infrastructure coverage. Automotive manufacturers obtain limited immediate value from installing V2X hardware where connected-road coverage is fragmented, while infrastructure operators may delay investment until the enabled vehicle population becomes sufficiently large. Long automotive qualification cycles, protocol-stack integration, radio-frequency certification and interoperability testing also extend the period between chip introduction and material revenue generation. Technology coexistence adds further complexity because IEEE 802.11p, ITS-G5, LTE-V2X and future NR-V2X platforms may require different radio, software and certification strategies. Integrated cellular and V2X devices can improve system economics, but allocating incremental chip cost to a function whose service coverage varies by region remains a commercial constraint.

Opportunities

The most significant opportunity lies in the transition from warning-oriented V2X services toward cooperative perception and coordinated driving. NR-V2X can support more advanced sidelink communications, creating potential demand for new chip generations, dual-mode platforms and higher-value automotive connectivity SoCs. City-scale vehicle-road-cloud programs offer opportunities in connected intersections, urban corridors and roadside sensing, while ports, mines, logistics parks and other controlled environments can adopt V2X without waiting for nationwide infrastructure coverage. Additional opportunities are emerging in commercial fleets, emergency vehicles, road-construction safety and vulnerable-road-user protection, where concentrated deployment can produce measurable operational or safety benefits. Suppliers capable

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of combining V2X, cellular connectivity, positioning and security in an automotive-qualified platform are positioned to capture a greater proportion of system value.

Challenges

Long-term challenges include cross-vendor interoperability, regional spectrum and standards differences, cybersecurity management and uncertainty surrounding the timing of large-scale vehicle installation. V2X devices must exchange safety-critical information across different vehicle brands, modules, roadside units and software stacks, making conformity testing and minimum performance standards essential. Suppliers must also maintain long product lifecycles while supporting successive communication releases, creating a risk that early hardware becomes technologically outdated before deployment reaches full scale. The limited number of validated chip suppliers reduces fragmentation but increases dependence on a small set of technology platforms. Consolidation, including the acquisition of specialist V2X companies by larger semiconductor groups, may improve global product support while also increasing customer exposure to platform concentration and product-roadmap changes.

Industry Chain Analysis

The upstream V2X Communication Chip industry chain includes semiconductor intellectual property, electronic-design-automation tools, automotive-grade process technologies, wafer fabrication, RF components, memory, security elements, packaging, testing and automotive reliability services. Chip developers must combine wireless standards expertise with RF, baseband, processor, security and automotive-interface design. For fabless suppliers, wafer fabrication and packaging are performed by external manufacturing partners, while integrated-device manufacturers may retain part of these processes internally. Development expenditure is concentrated in communication algorithms, chip architecture, tape-out, automotive qualification, protocol compatibility and long-term software maintenance rather than in physical materials alone.

The midstream segment converts these inputs into standalone modems, RF-baseband chipsets, dedicated V2X SoCs and integrated cellular-V2X processors. Downstream integration occurs through communication modules, telematics control units, onboard units, roadside units and vehicle connectivity platforms. A chipset provides the wireless modem and fundamental transmission functions, while a module adds supporting

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processors, positioning, security, interfaces and board-level components. Value creation is therefore concentrated in reliable physical-layer implementation, automotive certification, reference designs, protocol-stack compatibility and the ability to support customers throughout multiyear vehicle and infrastructure programs. Suppliers with reusable automotive platforms and established software ecosystems generally have stronger economics than vendors dependent on isolated project-based chip designs.

Segment Insights

By communication standard, LTE-V2X represents the largest current commercial segment, supported by established PC5 specifications, available chipsets and expanding vehicle-road infrastructure projects. IEEE 802.11p, DSRC and ITS-G5 remain commercially relevant in legacy and continuing programs, particularly where installed roadside systems and regulatory frameworks already support these technologies. NR-V2X represents the principal technology-upgrade opportunity, but its commercial contribution remains below that of established LTE-V2X and 802.11p platforms. Multi-standard products can address migration requirements, although their higher design complexity and certification workload may limit adoption to suppliers with broader automotive communication capabilities.

By product type and integration level, the market comprises baseband chips, modem ASICs, RF transceivers, chipsets, dedicated V2X SoCs and integrated cellular-V2X connectivity processors. Standalone products remain appropriate for specialized safety devices and roadside equipment, whereas integrated SoCs are gaining importance in vehicle telematics because they reduce board area, power consumption and component count. Basic safety applications currently form the broadest commercial application base. Cooperative perception and cooperative driving are the most important emerging directions, requiring greater processing capacity, communication reliability and coordination with onboard sensors. Dual-connectivity architectures combining direct sidelink and cellular-network communication are becoming increasingly important because they support time-critical local exchange together with cloud and traffic-platform connectivity.

Downstream Market Opportunities

The largest downstream opportunity is the gradual adoption of V2X Communication Chip platforms in factory-installed vehicle connectivity systems, where the technology can complement camera, radar and lidar information with non-line-of-sight road

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intelligence. Roadside infrastructure offers an additional source of demand through connected intersections, signal controllers, highway corridors and safety-warning systems. Commercial fleets and controlled operating environments may commercialize more rapidly because vehicles and infrastructure can be deployed under a unified operating model. As connected-vehicle penetration increases, applications are expected to progress from basic warnings toward shared perception, coordinated lane changes, platooning and infrastructure-assisted automated driving. Opportunities will favor chip platforms that can support both vehicle-side and roadside products while maintaining consistent security, positioning and protocol performance.

Regional Insights

China is the most active market for new C-V2X deployment, supported by national vehicle-road-cloud pilot programs, city-level infrastructure investment and efforts to increase onboard-terminal penetration. The initial program covers 20 cities or city alliances and emphasizes C-V2X roadside units, connected traffic facilities, edge computing and interoperable urban platforms. These initiatives provide local chip suppliers with opportunities to participate in vehicle, roadside and controlled-environment projects, although the conversion of pilot investment into sustainable recurring demand remains important to monitor.

North America is moving toward broader deployment through the U.S. national V2X plan and federally supported connected-vehicle projects. Europe retains a meaningful installed and product base associated with IEEE 802.11p and ITS-G5, creating demand for continued support and potential multi-standard migration. Japan also has a history of dedicated V2X semiconductor development, while South Korea and Taiwan are more likely to participate through integrated automotive connectivity platforms. Regional differences in spectrum policy, infrastructure readiness and preferred communication standards will continue to shape product configuration and supplier positioning.

Competitive Landscape Analysis

The V2X Communication Chip market has a highly concentrated competitive structure, with seven validated parent-level suppliers in the formal core list. Competition is based less on headline processor performance than on standards implementation, automotive qualification, radio reliability, security, software compatibility and multiyear program support. Qualcomm has strengthened its position by integrating Autotalks, expanding its

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ability to address cellular V2X and established direct-communication technologies under a broader automotive platform. NXP and Renesas possess verified IEEE 802.11p and DSRC product experience, although Renesas is more closely associated with an earlier product generation. Huawei, ZTE and China Information and Communication Technologies Group participate through communications-chip and C-V2X SoC capabilities, while UNISOC is positioned through an integrated 5G, V2X and IoT NTN automotive platform with more limited public detail on its V2X implementation. The competitive direction favors larger platform suppliers and specialized vendors with validated automotive products; however, regional supply-chain strategies may preserve opportunities for domestic chip developers that can secure vehicle qualification, module ecosystems and repeatable commercial deployments.

Report Scope

This report studies the global V2X Communication Chip production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for V2X 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 V2X Communication Chip that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global V2X Communication Chip total production and demand, 2021-2032, (Million Units)

Global V2X Communication Chip total production value, 2021-2032, (USD Million)

Global V2X Communication Chip production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Units), (based on production site)

Global V2X Communication Chip consumption by region & country, CAGR, 2021-2032 & (Million Units)

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U.S. VS China: V2X Communication Chip domestic production, consumption, key domestic manufacturers and share

Global V2X Communication Chip production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Units)

Global V2X Communication Chip production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global V2X Communication Chip production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global V2X 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 Huawei Technologies Co., Ltd., Qualcomm Incorporated, ZTE Corporation, NXP Semiconductors N.V., Renesas Electronics Corporation, China Information and Communication Technologies Group Corporation, UNISOC (Shanghai) 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 V2X 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 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 V2X Communication Chip Market, By Region:

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United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global V2X Communication Chip Market, Segmentation by Type:

V2X Baseband Chip

V2X Modem Chip

V2X RF Transceiver

V2X System-on-Chip

V2X Chipset

Other

Global V2X Communication Chip Market, Segmentation by Communication Standard:

IEEE 802.11p / DSRC

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ITS-G5

LTE-V2X

NR-V2X

Multi-standard V2X

Other

Global V2X Communication Chip Market, Segmentation by Integration Level:

Discrete V2X Chip

Semi-integrated V2X Chip

Integrated V2X SoC

Integrated Cellular and V2X SoC

Other

Global V2X Communication Chip Market, Segmentation by Connectivity Architecture:

Direct Sidelink Only

Sidelink and Cellular Dual-connectivity

Hybrid Multi-radio Connectivity

Other

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Global V2X Communication Chip Market, Segmentation by Application:

Basic Safety Applications

Cooperative Perception

Cooperative Driving

Other

Companies Profiled:

Huawei Technologies Co., Ltd.

Qualcomm Incorporated

ZTE Corporation

NXP Semiconductors N.V.

Renesas Electronics Corporation

China Information and Communication Technologies Group Corporation

UNISOC (Shanghai) Technologies Co., Ltd.

Key Questions Answered

1. How big is the global V2X Communication Chip market?
2. What is the demand of the global V2X Communication Chip market?
3. What is the year over year growth of the global V2X Communication Chip market?
4. What is the total value of the global V2X Communication Chip market?
5. Who are the Major Players in the global V2X Communication Chip market?
6. What are the growth factors driving the market demand?

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