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Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Market Growth 2026-2032

https://marketpublishers.com/r/GCAC1A46AF39EN.html
Date: October 2026
Pages: 107
Price: US$ 3,660.00 (Single User License)
ID: GCAC1A46AF39EN

Abstracts

The global Automotive-Grade UWB Ranging and Radar Sensing SoCs market size is predicted to grow from US$ 7.09 million in 2025 to US$ 510 million in 2032; it is expected to grow at a CAGR of 60.9% from 2026 to 2032.

Automotive-grade UWB ranging and radar sensing SoCs are automotive-qualified ultra-wideband integrated circuits that combine secure ranging, localization and short-range sensing capabilities on the same semiconductor platform. These devices typically integrate UWB RF transmit and receive paths, baseband processing, embedded MCU resources, memory, security functions and automotive interfaces, with implementations ranging from single-transmitter architectures to multi-transmitter and multi-receiver designs. The market focuses on semiconductor products capable of performing conventional UWB ranging functions such as time-of-flight, time-difference-of-arrival and angle estimation while also supporting UWB radar or sensing functions such as presence detection, child presence detection, occupancy sensing, kick sensing and short-range exterior sensing. Their principal commercial value lies in digital-key and vehicle-access architectures where installed UWB nodes can be reused for sensing, increasing hardware utilization while reducing incremental system complexity. Automotive qualification, security, functional safety, wireless interoperability and long-term vehicle-platform reliability are therefore central product requirements.

Key Findings

The 2026 global market volume is estimated at 4.0 million units with a weighted ASP of US$7.51 per unit

Commercial adoption is moving from engineering validation and sampling into early

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vehicle production and volume ramp

IEEE 802.15.4z-class devices remain dominant in 2026 while 802.15.4ab-capable products are entering commercial deployment

Competition remains concentrated among early commercial suppliers while the qualified vendor pool is expanding across major automotive semiconductor regions

Market Trends

Automotive UWB is evolving from a primarily secure-ranging technology for digital keys into a reusable short-range spatial-awareness platform. The installed base created by digital vehicle access provides an economic foundation for this transition: once multiple UWB nodes are already distributed around a vehicle, radar-capable SoCs can extend the same hardware toward child presence detection, occupancy sensing, kick sensing, intrusion monitoring and exterior short-range perception. This architecture can reduce incremental sensors, wiring and control electronics compared with adding an independent sensing subsystem. NXP has confirmed deployment of its ranging-and-radar UWB platform in selected BMW 2026 vehicle programs, while Qorvo currently lists its automotive QPF5100Q as Production, illustrating the shift from technology demonstration toward commercial deployment.

The next technology cycle is increasingly centered on stronger sensing capability, improved non-line-of-sight robustness, multi-antenna RF architectures and tighter integration of security and edge processing. IEEE P802.15.4ab introduces enhanced ranging, narrowband-assisted operation, interference mitigation and explicit UWB sensing capabilities for presence detection and environment mapping. Commercial implementation is already emerging: Calterah’s production CAL1106AQ supports IEEE 802.15.4z and 802.15.4ab with a 2T4R architecture and monostatic UWB radar, while STMicroelectronics is developing an 802.15.4ab and narrowband-assisted automotive platform with high-performance UWB radar.

Market Dynamics

Drivers

The principal demand driver is the rapid expansion of standardized digital vehicle access combined with the ability to reuse UWB hardware for additional safety and convenience functions. The Car Connectivity Consortium certified 115 products during

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2025 and expanded certification coverage to Bluetooth LE and UWB, indicating that digital-key infrastructure is moving beyond early niche deployments. Child presence detection and other in-cabin sensing functions add a second demand layer because radar-capable UWB devices can provide these functions without requiring a completely separate wireless anchor network. Euro NCAP continues to maintain a dedicated Child Presence Detection Test and Assessment Protocol, reinforcing the commercial relevance of reliable in-cabin sensing while remaining technology-neutral.

Restraints

Automotive qualification and commercialization cycles remain the main restraint on near-term market expansion. A technically complete UWB SoC must still pass automotive reliability, security and OEM-specific validation before generating meaningful vehicle-production revenue, creating a substantial gap between product announcement, engineering sampling, design win and SOP. This is visible in the current product landscape: Qorvo’s QPF5100Q is already in Production, while ST64UWB-A500 remains in the design stage. Cost-sensitive platforms can also retain conventional ranging-only UWB solutions when radar functions do not justify additional semiconductor complexity, limiting the maximum penetration of dual-function devices.

Opportunities

The largest opportunity is to turn the existing automotive UWB node network into a multi-function sensing platform rather than treating each UWB anchor as a dedicated digital-key component. Higher-performance RF configurations, integrated radar processing and 802.15.4ab-capable architectures can extend semiconductor value into in-cabin sensing, parking assistance, gesture detection and other short-range functions. This supports chip value even as unit ASPs gradually decline because the SoC can eliminate or simplify other system components. Calterah, for example, explicitly positions digital-key anchors for reuse across multiple radar functions, while ST promotes integrated ranging and radar as a route to fewer anchors, reduced wiring and lower system complexity.

Challenges

The market faces substitution pressure on both sides of its value proposition. Bluetooth Channel Sounding introduces high-precision ranging for applications including digital car keys, creating a credible alternative for vehicle platforms that need precise access control but do not require UWB radar capabilities. On the sensing side, dedicated radar, cameras and other cabin sensors can outperform UWB in specific functions, so UWB

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sensing must demonstrate lower total system cost or superior hardware reuse rather than competing solely on standalone sensing performance. The long-term competitive challenge is therefore to preserve the combined economic advantage of secure ranging and reusable sensing as alternative wireless-ranging and dedicated-sensor technologies continue to improve.

Industry Chain Analysis

The upstream industry chain consists of mixed-signal and RF semiconductor process technology, wafer fabrication, embedded memory and security IP, automotive packaging substrates, assembly, test and qualification services. The market does not rely exclusively on leading-edge logic nodes: current automotive UWB implementations include 18 nm FD-SOI and 22 nm CMOS, reflecting the importance of RF performance, low power, automotive reliability and mixed-signal integration rather than maximum transistor density. Midstream suppliers integrate UWB RF, digital baseband, MCU resources, memory, security and automotive interfaces into qualified SoCs, then provide development platforms, software stacks and radar algorithms required for Tier 1 integration.

Downstream commercialization is driven primarily through direct design-in relationships with Tier 1 suppliers and vehicle OEMs rather than anonymous spot-market distribution. Tier 1 suppliers typically integrate the semiconductor into vehicle anchors, communication modules and control architectures, while OEMs determine node topology, security requirements, functional reuse and platform lifecycle. Engineering samples and standard UWB products can also move through authorized distribution channels, but automotive production economics are predominantly project-driven. As a result, design wins, qualification status and vehicle SOP timing have greater near-term influence on supplier revenue than nominal wafer capacity.

Segment Insights

The principal quantifiable product segmentation is UWB technology generation. IEEE 802.15.4z-class devices account for the overwhelming majority of 2026 market volume, while 802.15.4ab-capable products represent approximately 1.25% as the first commercial devices enter production. The technology mix is expected to shift substantially as enhanced ranging, UWB sensing and narrowband-assisted architectures become available across more supplier platforms. IEEE 802.15.4ab-capable products are projected to become the majority around 2030 and reach 72% of target-market volume by 2032, while a meaningful 802.15.4z-class segment remains

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because of lower-cost platforms, long automotive product cycles and proprietary enhanced PHY implementations. IEEE currently identifies P802.15.4ab as a draft amendment covering enhanced ranging, narrowband-assisted UWB and sensing capabilities.

RF transceiver path configuration is also an important physical product differentiator, with commercial architectures ranging from 1T1R through 1T2R and 1T3R to higher-end 2T4R implementations. More receive and transmit paths can support improved angle estimation, radar performance and multi-target sensing. However, supplier-level annual SKU shipment mixes are not consistently disclosed, making RF-path configuration more useful as a technical product taxonomy and competitive-performance indicator than as a quantified annual market-size segmentation.

Downstream Market Opportunities

The most attractive downstream opportunity remains the extension of secure car access and digital-key hardware into a broader vehicle sensing platform. In-cabin sensing, including child presence detection, occupancy and vital-sign-related presence monitoring, can create additional value from UWB nodes already required for access. Kick and gesture sensing provide another low-incremental-hardware use case, while exterior short-range sensing and parking assistance can benefit from multi-anchor geometries and newer sensing-capable PHYs. The economic opportunity is strongest where the same semiconductor node serves several functions rather than requiring separate chip volumes for every application. Calterah’s CAL1106AQ platform, for example, supports reuse of digital-key anchors for parking sensing and other radar functions.

Regional Insights

Asia is becoming increasingly important to both demand growth and semiconductor supply. Global vehicle-production growth shifted toward Asia in 2025, while China has developed a dense group of local UWB semiconductor suppliers competing on automotive qualification, local engineering support, flexible RF configurations and rapid OEM adaptation. This creates a fast product-iteration environment and increases pricing pressure as domestic suppliers progress from engineering validation into automotive design wins. OICA reported that global vehicle production increased from 92.7 million units in 2024 to 96.4 million units in 2025, with growth increasingly concentrated in Asia.

Europe is more strongly shaped by established automotive semiconductor platforms,

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safety requirements and standards development. NXP has achieved a disclosed OEM deployment milestone, while Infineon and STMicroelectronics are extending UWB portfolios toward sensing, security and next-generation PHY architectures. North American supply is more concentrated, with Qorvo representing a clear production-stage automotive ranging-and-sensing platform. South Korea remains strategically relevant through Samsung Electronics, although its automotive UWB products are earlier in the commercialization cycle. Regional competition is therefore differentiated less by vehicle production alone than by the speed of OEM design-in, automotive qualification and support for multi-function UWB architectures.

Competitive Landscape Analysis

Competition remains concentrated in the early commercial phase because only a subset of the confirmed supplier pool has reached meaningful automotive deployment. NXP has the clearest disclosed combination of automotive UWB platform experience and OEM deployment through its BMW program, while Qorvo is a major global challenger with a Production automotive UWB SoC and a mature UWB technology ecosystem. CXSemi has become an important Chinese commercialization benchmark, with its CX500 series having exceeded one million cumulative shipments and serving more than 20 OEM and Tier 1 customers. NewRadioTech, Calterah, Maxscend and Ultraception represent an expanding group of Chinese suppliers advancing through production and vehicle design-in stages.

The next competitive phase is likely to become more fragmented before consolidating around platform winners. Infineon, STMicroelectronics and Samsung Electronics bring extensive automotive customer relationships, security capabilities and semiconductor scale, while established and emerging Chinese suppliers compete through localization, cost, RF architecture and faster customer adaptation. Sustainable leadership will depend less on a single ranging specification than on the ability to combine automotive qualification, secure access, radar sensing, software, standards interoperability and long-term supply into a reusable vehicle platform.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Automotive-Grade UWB Ranging and Radar Sensing SoCs Industry Forecast” looks at past sales and reviews total world Automotive-Grade UWB Ranging and Radar Sensing SoCs sales in 2025, providing a comprehensive analysis by region and market sector of projected Automotive-Grade UWB Ranging and Radar Sensing SoCs sales for 2026 through

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2032. With Automotive-Grade UWB Ranging and Radar Sensing SoCs sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Automotive-Grade UWB Ranging and Radar Sensing SoCs industry.

This Insight Report provides a comprehensive analysis of the global Automotive-Grade UWB Ranging and Radar Sensing SoCs landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Automotive-Grade UWB Ranging and Radar Sensing SoCs portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Automotive-Grade UWB Ranging and Radar Sensing SoCs market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Automotive-Grade UWB Ranging and Radar Sensing SoCs and breaks down the forecast by UWB Technology Generation, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Automotive-Grade UWB Ranging and Radar Sensing SoCs.

This report presents a comprehensive overview, market shares, and growth opportunities of Automotive-Grade UWB Ranging and Radar Sensing SoCs market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by UWB Technology Generation:

IEEE 802.15.4z-Class UWB SoCs

IEEE 802.15.4ab-Capable UWB SoCs

Segmentation by RF Transceiver Path Configuration:

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1T1R Architecture

1T2R Architecture

1T3R Architecture

1T4R Architecture

2T3R Architecture

2T4R Architecture

Other RF Path Architectures

Segmentation by Application:

Secure Car Access and Digital Key

In-Cabin Sensing

Kick and Gesture Sensing

Exterior Short-Range Sensing

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

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- APAC
  - China
  - Japan
  - Korea
  - Southeast Asia
  - India
  - Australia
- Europe
  - Germany
  - France
  - UK
  - Italy
  - Russia
- Middle East & Africa
  - Egypt
  - South Africa
  - Israel
  - Turkey
  - GCC Countries

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The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

NXP

Qorvo

Calterah

CXSemi

Infineon

NewRadioTech

Osemitech

GiantSemi

MKSEMI

Maxscend

STMicroelectronics

Samsung Electronics

Chipsbank

Ultraception

UNISOC

Key Questions Addressed in this Report

What is the 10-year outlook for the global Automotive-Grade UWB Ranging and

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Radar Sensing SoCs market?

What factors are driving Automotive-Grade UWB Ranging and Radar Sensing SoCs market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Automotive-Grade UWB Ranging and Radar Sensing SoCs market opportunities vary by end market size?

How does Automotive-Grade UWB Ranging and Radar Sensing SoCs break out by UWB Technology Generation, by Application?

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Contents

1 SCOPE OF THE REPORT

1.1 Market Introduction
1.2 Years Considered
1.3 Research Objectives
1.4 Market Research Methodology
1.5 Research Process and Data Source
1.6 Economic Indicators
1.7 Currency Considered
1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview
  2.1.1 Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for Automotive-Grade UWB Ranging and Radar Sensing SoCs by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for Automotive-Grade UWB Ranging and Radar Sensing SoCs by Country/Region, 2021, 2025 & 2032
2.2 Automotive-Grade UWB Ranging and Radar Sensing SoCs Segment by UWB Technology Generation
  2.2.1 IEEE 802.15.4z-Class UWB SoCs
  2.2.2 IEEE 802.15.4ab-Capable UWB SoCs
  2.2.3 Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by UWB Technology Generation
    2.2.3.1 Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share by UWB Technology Generation (2021-2026)
    2.2.3.2 Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue and Market Share by UWB Technology Generation (2021-2026)
    2.2.3.3 Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sale Price by UWB Technology Generation (2021-2026)
2.3 Automotive-Grade UWB Ranging and Radar Sensing SoCs Segment by RF Transceiver Path Configuration
  2.3.1 1T1R Architecture
  2.3.2 1T2R Architecture
  2.3.3 1T3R Architecture

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2.3.4 1T4R Architecture
2.3.5 2T3R Architecture
2.3.6 2T4R Architecture
2.3.7 Other RF Path Architectures
2.3.8 Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by RF Transceiver Path Configuration
2.3.8.1 Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share by RF Transceiver Path Configuration (2021-2026)
2.3.8.2 Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue and Market Share by RF Transceiver Path Configuration (2021-2026)
2.3.8.3 Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sale Price by RF Transceiver Path Configuration (2021-2026)
2.4 Automotive-Grade UWB Ranging and Radar Sensing SoCs Segment by Application
2.4.1 Secure Car Access and Digital Key
2.4.2 In-Cabin Sensing
2.4.3 Kick and Gesture Sensing
2.4.4 Exterior Short-Range Sensing
2.4.5 Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by Application
2.4.5.1 Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sale Market Share by Application (2021-2026)
2.4.5.2 Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue and Market Share by Application (2021-2026)
2.4.5.3 Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Breakdown Data by Company
3.1.1 Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Annual Sales by Company (2021-2026)
3.1.2 Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share by Company (2021-2026)
3.2 Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Annual Revenue by Company (2021-2026)
3.2.1 Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue by Company (2021-2026)
3.2.2 Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Market Share by Company (2021-2026)

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info@marketpublishers.com

3.3 Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sale Price by Company
3.4 Key Manufacturers Automotive-Grade UWB Ranging and Radar Sensing SoCs Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Location Distribution
3.4.2 Players Automotive-Grade UWB Ranging and Radar Sensing SoCs Products Offered
3.5 Market Concentration Rate Analysis
3.5.1 Competition Landscape Analysis
3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
3.6 New Products and Potential Entrants
3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR AUTOMOTIVE-GRADE UWB RANGING AND RADAR SENSING SOCS BY GEOGRAPHIC REGION

4.1 World Historic Automotive-Grade UWB Ranging and Radar Sensing SoCs Market Size by Geographic Region (2021-2026)
4.1.1 Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Annual Sales by Geographic Region (2021-2026)
4.1.2 Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic Automotive-Grade UWB Ranging and Radar Sensing SoCs Market Size by Country/Region (2021-2026)
4.2.1 Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Annual Sales by Country/Region (2021-2026)
4.2.2 Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Annual Revenue by Country/Region (2021-2026)
4.3 Americas Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Growth
4.4 APAC Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Growth
4.5 Europe Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Growth
4.6 Middle East & Africa Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Growth

5 AMERICAS

5.1 Americas Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by Country

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5.1.1 Americas Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by Country (2021-2026)
5.1.2 Americas Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue by Country (2021-2026)
5.2 Americas Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by UWB Technology Generation (2021-2026)
5.3 Americas Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by Region
6.1.1 APAC Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by Region (2021-2026)
6.1.2 APAC Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue by Region (2021-2026)
6.2 APAC Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by UWB Technology Generation (2021-2026)
6.3 APAC Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by Application (2021-2026)
6.4 China
6.5 Japan
6.6 South Korea
6.7 Southeast Asia
6.8 India
6.9 Australia
6.10 China Taiwan

7 EUROPE

7.1 Europe Automotive-Grade UWB Ranging and Radar Sensing SoCs by Country
7.1.1 Europe Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by Country (2021-2026)
7.1.2 Europe Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue by Country (2021-2026)

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7.2 Europe Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by UWB Technology Generation (2021-2026)
7.3 Europe Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by Application (2021-2026)
7.4 Germany
7.5 France
7.6 UK
7.7 Italy
7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Automotive-Grade UWB Ranging and Radar Sensing SoCs by Country
  8.1.1 Middle East & Africa Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by Country (2021-2026)
  8.1.2 Middle East & Africa Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue by Country (2021-2026)
8.2 Middle East & Africa Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by UWB Technology Generation (2021-2026)
8.3 Middle East & Africa Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by Application (2021-2026)
8.4 Egypt
8.5 South Africa
8.6 Israel
8.7 Turkey
8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities
9.2 Market Challenges & Risks
9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of Automotive-Grade UWB Ranging and Radar Sensing SoCs

+357 96 030922
info@marketpublishers.com

10.3 Manufacturing Process Analysis of Automotive-Grade UWB Ranging and Radar Sensing SoCs
10.4 Industry Chain Structure of Automotive-Grade UWB Ranging and Radar Sensing SoCs

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
  11.1.1 Direct Channels
  11.1.2 Indirect Channels
11.2 Automotive-Grade UWB Ranging and Radar Sensing SoCs Distributors
11.3 Automotive-Grade UWB Ranging and Radar Sensing SoCs Customer

12 WORLD FORECAST REVIEW FOR AUTOMOTIVE-GRADE UWB RANGING AND RADAR SENSING SOCS BY GEOGRAPHIC REGION

12.1 Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Market Size Forecast by Region
  12.1.1 Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Forecast by Region (2027-2032)
  12.1.2 Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Annual Revenue Forecast by Region (2027-2032)
12.2 Americas Forecast by Country (2027-2032)
12.3 APAC Forecast by Region (2027-2032)
12.4 Europe Forecast by Country (2027-2032)
12.5 Middle East & Africa Forecast by Country (2027-2032)
12.6 Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Forecast by UWB Technology Generation (2027-2032)
12.7 Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 NXP
  13.1.1 NXP Company Information
  13.1.2 NXP Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
  13.1.3 NXP Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales, Revenue, Price and Gross Margin (2021-2026)

+357 96 030922
info@marketpublishers.com

13.1.4 NXP Main Business Overview
13.1.5 NXP Latest Developments
13.2 Qorvo
13.2.1 Qorvo Company Information
13.2.2 Qorvo Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
13.2.3 Qorvo Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 Qorvo Main Business Overview
13.2.5 Qorvo Latest Developments
13.3 Calterah
13.3.1 Calterah Company Information
13.3.2 Calterah Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
13.3.3 Calterah Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 Calterah Main Business Overview
13.3.5 Calterah Latest Developments
13.4 CXSemi
13.4.1 CXSemi Company Information
13.4.2 CXSemi Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
13.4.3 CXSemi Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 CXSemi Main Business Overview
13.4.5 CXSemi Latest Developments
13.5 Infineon
13.5.1 Infineon Company Information
13.5.2 Infineon Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
13.5.3 Infineon Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 Infineon Main Business Overview
13.5.5 Infineon Latest Developments
13.6 NewRadioTech
13.6.1 NewRadioTech Company Information
13.6.2 NewRadioTech Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
13.6.3 NewRadioTech Automotive-Grade UWB Ranging and Radar Sensing SoCs

+357 96 030922
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Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 NewRadioTech Main Business Overview
13.6.5 NewRadioTech Latest Developments
13.7 Osemitech
13.7.1 Osemitech Company Information
13.7.2 Osemitech Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
13.7.3 Osemitech Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 Osemitech Main Business Overview
13.7.5 Osemitech Latest Developments
13.8 GiantSemi
13.8.1 GiantSemi Company Information
13.8.2 GiantSemi Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
13.8.3 GiantSemi Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 GiantSemi Main Business Overview
13.8.5 GiantSemi Latest Developments
13.9 MKSEMI
13.9.1 MKSEMI Company Information
13.9.2 MKSEMI Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
13.9.3 MKSEMI Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 MKSEMI Main Business Overview
13.9.5 MKSEMI Latest Developments
13.10 Maxscend
13.10.1 Maxscend Company Information
13.10.2 Maxscend Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
13.10.3 Maxscend Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 Maxscend Main Business Overview
13.10.5 Maxscend Latest Developments
13.11 STMicroelectronics
13.11.1 STMicroelectronics Company Information
13.11.2 STMicroelectronics Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications

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13.11.3 STMicroelectronics Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 STMicroelectronics Main Business Overview
13.11.5 STMicroelectronics Latest Developments
13.12 Samsung Electronics
13.12.1 Samsung Electronics Company Information
13.12.2 Samsung Electronics Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
13.12.3 Samsung Electronics Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales, Revenue, Price and Gross Margin (2021-2026)
13.12.4 Samsung Electronics Main Business Overview
13.12.5 Samsung Electronics Latest Developments
13.13 Chipsbank
13.13.1 Chipsbank Company Information
13.13.2 Chipsbank Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
13.13.3 Chipsbank Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales, Revenue, Price and Gross Margin (2021-2026)
13.13.4 Chipsbank Main Business Overview
13.13.5 Chipsbank Latest Developments
13.14 Ultraception
13.14.1 Ultraception Company Information
13.14.2 Ultraception Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
13.14.3 Ultraception Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales, Revenue, Price and Gross Margin (2021-2026)
13.14.4 Ultraception Main Business Overview
13.14.5 Ultraception Latest Developments
13.15 UNISOC
13.15.1 UNISOC Company Information
13.15.2 UNISOC Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
13.15.3 UNISOC Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales, Revenue, Price and Gross Margin (2021-2026)
13.15.4 UNISOC Main Business Overview
13.15.5 UNISOC Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

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List Of Tables

LIST OF TABLES

Table 1. Automotive-Grade UWB Ranging and Radar Sensing SoCs Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. Automotive-Grade UWB Ranging and Radar Sensing SoCs Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of IEEE 802.15.4z-Class UWB SoCs
Table 4. Major Players of IEEE 802.15.4ab-Capable UWB SoCs
Table 5. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by UWB Technology Generation (2021-2026) & (Units)
Table 6. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share by UWB Technology Generation (2021-2026)
Table 7. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue by UWB Technology Generation (2021-2026) & ($ million)
Table 8. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Market Share by UWB Technology Generation (2021-2026)
Table 9. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sale Price by UWB Technology Generation (2021-2026) & (US$/Unit)
Table 10. Major Players of 1T1R Architecture
Table 11. Major Players of 1T2R Architecture
Table 12. Major Players of 1T3R Architecture
Table 13. Major Players of 1T4R Architecture
Table 14. Major Players of 2T3R Architecture
Table 15. Major Players of 2T4R Architecture
Table 16. Major Players of Other RF Path Architectures
Table 17. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by RF Transceiver Path Configuration (2021-2026) & (Units)
Table 18. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share by RF Transceiver Path Configuration (2021-2026)
Table 19. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue by RF Transceiver Path Configuration (2021-2026) & ($ million)
Table 20. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Market Share by RF Transceiver Path Configuration (2021-2026)
Table 21. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sale Price by RF Transceiver Path Configuration (2021-2026) & (US$/Unit)
Table 22. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sale by Application (2021-2026) & (Units)

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Table 23. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sale Market Share by Application (2021-2026)
Table 24. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue by Application (2021-2026) & ($ million)
Table 25. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Market Share by Application (2021-2026)
Table 26. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sale Price by Application (2021-2026) & (US$/Unit)
Table 27. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by Company (2021-2026) & (Units)
Table 28. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share by Company (2021-2026)
Table 29. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue by Company (2021-2026) & ($ millions)
Table 30. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Market Share by Company (2021-2026)
Table 31. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sale Price by Company (2021-2026) & (US$/Unit)
Table 32. Key Manufacturers Automotive-Grade UWB Ranging and Radar Sensing SoCs Producing Area Distribution and Sales Area
Table 33. Players Automotive-Grade UWB Ranging and Radar Sensing SoCs Products Offered
Table 34. Automotive-Grade UWB Ranging and Radar Sensing SoCs Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 35. New Products and Potential Entrants
Table 36. Market M&A Activity & Strategy
Table 37. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by Geographic Region (2021-2026) & (Units)
Table 38. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share Geographic Region (2021-2026)
Table 39. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue by Geographic Region (2021-2026) & ($ millions)
Table 40. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Market Share by Geographic Region (2021-2026)
Table 41. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by Country/Region (2021-2026) & (Units)
Table 42. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share by Country/Region (2021-2026)
Table 43. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue

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by Country/Region (2021-2026) & ($ millions)
Table 44. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Market Share by Country/Region (2021-2026)
Table 45. Americas Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by Country (2021-2026) & (Units)
Table 46. Americas Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share by Country (2021-2026)
Table 47. Americas Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue by Country (2021-2026) & ($ millions)
Table 48. Americas Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by UWB Technology Generation (2021-2026) & (Units)
Table 49. Americas Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by Application (2021-2026) & (Units)
Table 50. APAC Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by Region (2021-2026) & (Units)
Table 51. APAC Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share by Region (2021-2026)
Table 52. APAC Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue by Region (2021-2026) & ($ millions)
Table 53. APAC Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by UWB Technology Generation (2021-2026) & (Units)
Table 54. APAC Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by Application (2021-2026) & (Units)
Table 55. Europe Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by Country (2021-2026) & (Units)
Table 56. Europe Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue by Country (2021-2026) & ($ millions)
Table 57. Europe Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by UWB Technology Generation (2021-2026) & (Units)
Table 58. Europe Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by Application (2021-2026) & (Units)
Table 59. Middle East & Africa Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by Country (2021-2026) & (Units)
Table 60. Middle East & Africa Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Market Share by Country (2021-2026)
Table 61. Middle East & Africa Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by UWB Technology Generation (2021-2026) & (Units)
Table 62. Middle East & Africa Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by Application (2021-2026) & (Units)

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Table 63. Key Market Drivers & Growth Opportunities of Automotive-Grade UWB Ranging and Radar Sensing SoCs
Table 64. Key Market Challenges & Risks of Automotive-Grade UWB Ranging and Radar Sensing SoCs
Table 65. Key Industry Trends of Automotive-Grade UWB Ranging and Radar Sensing SoCs
Table 66. Automotive-Grade UWB Ranging and Radar Sensing SoCs Raw Material
Table 67. Key Suppliers of Raw Materials
Table 68. Automotive-Grade UWB Ranging and Radar Sensing SoCs Distributors List
Table 69. Automotive-Grade UWB Ranging and Radar Sensing SoCs Customer List
Table 70. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Forecast by Region (2027-2032) & (Units)
Table 71. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Forecast by Region (2027-2032) & ($ millions)
Table 72. Americas Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Forecast by Country (2027-2032) & (Units)
Table 73. Americas Automotive-Grade UWB Ranging and Radar Sensing SoCs Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 74. APAC Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Forecast by Region (2027-2032) & (Units)
Table 75. APAC Automotive-Grade UWB Ranging and Radar Sensing SoCs Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 76. Europe Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Forecast by Country (2027-2032) & (Units)
Table 77. Europe Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Forecast by Country (2027-2032) & ($ millions)
Table 78. Middle East & Africa Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Forecast by Country (2027-2032) & (Units)
Table 79. Middle East & Africa Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Forecast by Country (2027-2032) & ($ millions)
Table 80. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Forecast by UWB Technology Generation (2027-2032) & (Units)
Table 81. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Forecast by UWB Technology Generation (2027-2032) & ($ millions)
Table 82. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Forecast by Application (2027-2032) & (Units)
Table 83. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Forecast by Application (2027-2032) & ($ millions)
Table 84. NXP Basic Information, Automotive-Grade UWB Ranging and Radar Sensing

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SoCs Manufacturing Base, Sales Area and Its Competitors
Table 85. NXP Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
Table 86. NXP Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 87. NXP Main Business
Table 88. NXP Latest Developments
Table 89. Qorvo Basic Information, Automotive-Grade UWB Ranging and Radar Sensing SoCs Manufacturing Base, Sales Area and Its Competitors
Table 90. Qorvo Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
Table 91. Qorvo Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 92. Qorvo Main Business
Table 93. Qorvo Latest Developments
Table 94. Calterah Basic Information, Automotive-Grade UWB Ranging and Radar Sensing SoCs Manufacturing Base, Sales Area and Its Competitors
Table 95. Calterah Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
Table 96. Calterah Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 97. Calterah Main Business
Table 98. Calterah Latest Developments
Table 99. CXSemi Basic Information, Automotive-Grade UWB Ranging and Radar Sensing SoCs Manufacturing Base, Sales Area and Its Competitors
Table 100. CXSemi Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
Table 101. CXSemi Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 102. CXSemi Main Business
Table 103. CXSemi Latest Developments
Table 104. Infineon Basic Information, Automotive-Grade UWB Ranging and Radar Sensing SoCs Manufacturing Base, Sales Area and Its Competitors
Table 105. Infineon Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
Table 106. Infineon Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 107. Infineon Main Business
Table 108. Infineon Latest Developments

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Table 109. NewRadioTech Basic Information, Automotive-Grade UWB Ranging and Radar Sensing SoCs Manufacturing Base, Sales Area and Its Competitors
Table 110. NewRadioTech Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
Table 111. NewRadioTech Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 112. NewRadioTech Main Business
Table 113. NewRadioTech Latest Developments
Table 114. Osemitech Basic Information, Automotive-Grade UWB Ranging and Radar Sensing SoCs Manufacturing Base, Sales Area and Its Competitors
Table 115. Osemitech Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
Table 116. Osemitech Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 117. Osemitech Main Business
Table 118. Osemitech Latest Developments
Table 119. GiantSemi Basic Information, Automotive-Grade UWB Ranging and Radar Sensing SoCs Manufacturing Base, Sales Area and Its Competitors
Table 120. GiantSemi Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
Table 121. GiantSemi Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 122. GiantSemi Main Business
Table 123. GiantSemi Latest Developments
Table 124. MKSEMI Basic Information, Automotive-Grade UWB Ranging and Radar Sensing SoCs Manufacturing Base, Sales Area and Its Competitors
Table 125. MKSEMI Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
Table 126. MKSEMI Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 127. MKSEMI Main Business
Table 128. MKSEMI Latest Developments
Table 129. Maxscend Basic Information, Automotive-Grade UWB Ranging and Radar Sensing SoCs Manufacturing Base, Sales Area and Its Competitors
Table 130. Maxscend Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
Table 131. Maxscend Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 132. Maxscend Main Business

+357 96 030922
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Table 133. Maxscend Latest Developments
Table 134. STMicroelectronics Basic Information, Automotive-Grade UWB Ranging and Radar Sensing SoCs Manufacturing Base, Sales Area and Its Competitors
Table 135. STMicroelectronics Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
Table 136. STMicroelectronics Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 137. STMicroelectronics Main Business
Table 138. STMicroelectronics Latest Developments
Table 139. Samsung Electronics Basic Information, Automotive-Grade UWB Ranging and Radar Sensing SoCs Manufacturing Base, Sales Area and Its Competitors
Table 140. Samsung Electronics Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
Table 141. Samsung Electronics Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 142. Samsung Electronics Main Business
Table 143. Samsung Electronics Latest Developments
Table 144. Chipsbank Basic Information, Automotive-Grade UWB Ranging and Radar Sensing SoCs Manufacturing Base, Sales Area and Its Competitors
Table 145. Chipsbank Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
Table 146. Chipsbank Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 147. Chipsbank Main Business
Table 148. Chipsbank Latest Developments
Table 149. Ultraception Basic Information, Automotive-Grade UWB Ranging and Radar Sensing SoCs Manufacturing Base, Sales Area and Its Competitors
Table 150. Ultraception Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications
Table 151. Ultraception Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 152. Ultraception Main Business
Table 153. Ultraception Latest Developments
Table 154. UNISOC Basic Information, Automotive-Grade UWB Ranging and Radar Sensing SoCs Manufacturing Base, Sales Area and Its Competitors
Table 155. UNISOC Automotive-Grade UWB Ranging and Radar Sensing SoCs Product Portfolios and Specifications

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Table 156. UNISOC Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 157. UNISOC Main Business
Table 158. UNISOC Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of Automotive-Grade UWB Ranging and Radar Sensing SoCs
Figure 2. Automotive-Grade UWB Ranging and Radar Sensing SoCs Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Growth Rate 2021-2032 (Units)
Figure 7. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share by Country/Region (2025)
Figure 10. Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of IEEE 802.15.4z-Class UWB SoCs
Figure 12. Product Picture of IEEE 802.15.4ab-Capable UWB SoCs
Figure 13. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share by UWB Technology Generation in 2026
Figure 14. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Market Share by UWB Technology Generation (2021-2026)
Figure 15. Product Picture of 1T1R Architecture
Figure 16. Product Picture of 1T2R Architecture
Figure 17. Product Picture of 1T3R Architecture
Figure 18. Product Picture of 1T4R Architecture
Figure 19. Product Picture of 2T3R Architecture
Figure 20. Product Picture of 2T4R Architecture
Figure 21. Product Picture of Other RF Path Architectures
Figure 22. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share by RF Transceiver Path Configuration in 2026
Figure 23. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Market Share by RF Transceiver Path Configuration (2021-2026)
Figure 24. Automotive-Grade UWB Ranging and Radar Sensing SoCs Consumed in Secure Car Access and Digital Key

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Figure 25. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Market: Secure Car Access and Digital Key (2021-2026) & (Units)
Figure 26. Automotive-Grade UWB Ranging and Radar Sensing SoCs Consumed in In-Cabin Sensing
Figure 27. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Market: In-Cabin Sensing (2021-2026) & (Units)
Figure 28. Automotive-Grade UWB Ranging and Radar Sensing SoCs Consumed in Kick and Gesture Sensing
Figure 29. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Market: Kick and Gesture Sensing (2021-2026) & (Units)
Figure 30. Automotive-Grade UWB Ranging and Radar Sensing SoCs Consumed in Exterior Short-Range Sensing
Figure 31. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Market: Exterior Short-Range Sensing (2021-2026) & (Units)
Figure 32. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sale Market Share by Application (2025)
Figure 33. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Market Share by Application in 2025
Figure 34. Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales by Company in 2025 (Units)
Figure 35. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share by Company in 2025
Figure 36. Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue by Company in 2025 ($ millions)
Figure 37. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Market Share by Company in 2025
Figure 38. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share by Geographic Region (2021-2026)
Figure 39. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Market Share by Geographic Region in 2025
Figure 40. Americas Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales 2021-2026 (Units)
Figure 41. Americas Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue 2021-2026 ($ millions)
Figure 42. APAC Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales 2021-2026 (Units)
Figure 43. APAC Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue 2021-2026 ($ millions)
Figure 44. Europe Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales

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2021-2026 (Units)
Figure 45. Europe Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue 2021-2026 ($ millions)
Figure 46. Middle East & Africa Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales 2021-2026 (Units)
Figure 47. Middle East & Africa Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue 2021-2026 ($ millions)
Figure 48. Americas Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share by Country in 2025
Figure 49. Americas Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Market Share by Country (2021-2026)
Figure 50. Americas Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share by UWB Technology Generation (2021-2026)
Figure 51. Americas Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share by Application (2021-2026)
Figure 52. United States Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Growth 2021-2026 ($ millions)
Figure 53. Canada Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Growth 2021-2026 ($ millions)
Figure 54. Mexico Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Growth 2021-2026 ($ millions)
Figure 55. Brazil Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Growth 2021-2026 ($ millions)
Figure 56. APAC Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share by Region in 2025
Figure 57. APAC Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Market Share by Region (2021-2026)
Figure 58. APAC Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share by UWB Technology Generation (2021-2026)
Figure 59. APAC Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share by Application (2021-2026)
Figure 60. China Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Growth 2021-2026 ($ millions)
Figure 61. Japan Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Growth 2021-2026 ($ millions)
Figure 62. South Korea Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Growth 2021-2026 ($ millions)
Figure 63. Southeast Asia Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Growth 2021-2026 ($ millions)

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Figure 64. India Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Growth 2021-2026 ($ millions)
Figure 65. Australia Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Growth 2021-2026 ($ millions)
Figure 66. China Taiwan Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Growth 2021-2026 ($ millions)
Figure 67. Europe Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share by Country in 2025
Figure 68. Europe Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Market Share by Country (2021-2026)
Figure 69. Europe Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share by UWB Technology Generation (2021-2026)
Figure 70. Europe Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share by Application (2021-2026)
Figure 71. Germany Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Growth 2021-2026 ($ millions)
Figure 72. France Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Growth 2021-2026 ($ millions)
Figure 73. UK Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Growth 2021-2026 ($ millions)
Figure 74. Italy Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Growth 2021-2026 ($ millions)
Figure 75. Russia Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Growth 2021-2026 ($ millions)
Figure 76. Middle East & Africa Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share by Country (2021-2026)
Figure 77. Middle East & Africa Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share by UWB Technology Generation (2021-2026)
Figure 78. Middle East & Africa Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share by Application (2021-2026)
Figure 79. Egypt Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Growth 2021-2026 ($ millions)
Figure 80. South Africa Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Growth 2021-2026 ($ millions)
Figure 81. Israel Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Growth 2021-2026 ($ millions)
Figure 82. Turkey Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Growth 2021-2026 ($ millions)
Figure 83. GCC Countries Automotive-Grade UWB Ranging and Radar Sensing SoCs

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Revenue Growth 2021-2026 ($ millions)
Figure 84. Manufacturing Cost Structure Analysis of Automotive-Grade UWB Ranging and Radar Sensing SoCs in 2026
Figure 85. Manufacturing Process Analysis of Automotive-Grade UWB Ranging and Radar Sensing SoCs
Figure 86. Industry Chain Structure of Automotive-Grade UWB Ranging and Radar Sensing SoCs
Figure 87. Channels of Distribution
Figure 88. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Forecast by Region (2027-2032)
Figure 89. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Market Share Forecast by Region (2027-2032)
Figure 90. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share Forecast by UWB Technology Generation (2027-2032)
Figure 91. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Market Share Forecast by UWB Technology Generation (2027-2032)
Figure 92. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Sales Market Share Forecast by Application (2027-2032)
Figure 93. Global Automotive-Grade UWB Ranging and Radar Sensing SoCs Revenue Market Share Forecast by Application (2027-2032)

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