

Global Mobile Phone Mobile Broadband Modem Market Growth 2026-2032

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Abstracts

The global Mobile Phone Mobile Broadband Modem market size is predicted to grow from US\$ 10957 million in 2025 to US\$ 14218 million in 2032; it is expected to grow at a CAGR of 3.8% from 2026 to 2032.

A Mobile Phone Mobile Broadband Modem—commonly referred to in the handset industry as a cellular baseband/modem—is the subsystem that enables a smartphone to attach to a carrier’s cellular network and sustain data and voice services while the user moves across cells and radio conditions. It solves the fundamental problem of “reliable wide-area connectivity on the move” by converting between digital data and radio waveforms and by implementing the cellular protocol stack end-to-end (registration, authentication, scheduling, handover, power control, and data bearers), ensuring session continuity and acceptable throughput/latency under fluctuating signal quality and network load. Historically, handset modems evolved from relatively discrete 2G/3G baseband chips paired with separate RF transceivers into higher-integration 4G designs that improved multi-band/multi-mode support and power efficiency; with 5G, modems added wider bandwidths, more complex carrier aggregation and MIMO, lower latency targets, and broader frequency coverage, leading to two dominant product architectures: standalone modems that can iterate radio generations rapidly, and tightly integrated SoCs where the modem is embedded to optimize system power, cost, and thermal behavior. Upstream supply spans both materials and electronic component ecosystems: on the materials side, it includes high-purity silicon and process consumables (photoresists, specialty gases, wet chemicals), interconnect metals, and packaging materials such as substrates, resins, solder balls, and thermal interface/heat-spreading materials; on the component side, it includes modem silicon/IP development (DSP and protocol-stack IP), advanced wafer fabrication capacity, assembly/test services, companion components like memory and power management, and RF front-

end building blocks (filters, power amplifiers, LNAs, switches/tuners, and antenna matching networks) that are often combined into modules—together forming the upstream foundation required to deliver robust mobile broadband connectivity in modern smartphones. In 2025, global production capacity of mobile broadband modems for smartphones reached 1.5 billion units, while shipments totaled 1.241 billion units. The average selling price (ASP) was USD 9.02 per unit, and gross margins across manufacturers ranged between 50% and 70%.

The market today is characterized by deeper integration, clearer segmentation, and a longer end-to-end value chain. Mainstream devices increasingly rely on modem capabilities embedded tightly within application SoCs to optimize power, cost, and system coordination, while standalone modems remain concentrated in select form factors and fast-iteration tiers. Competitive differentiation has shifted beyond headline throughput toward holistic experience: coverage across fragmented bands and modes, robustness in weak and congested networks, uplink consistency, voice/data coexistence, location and emergency features, and the quality of tuning across RF front-end, antennas, OS networking stack, and carrier parameters. As RF and antenna complexity rises, the modem becomes less a discrete component and more a platform engineering program, where validation breadth, time-to-market discipline, yield and supply stability, and region/carrier readiness can be decisive. The ecosystem layer—patent licensing, regulatory compliance, and carrier acceptance—continues to shape who can compete and how quickly, making pure “spec wins” insufficient to change the landscape.

Looking forward, the trajectory centers on smarter connectivity, more controllable energy use, and tighter system-level orchestration. Instead of only scaling bandwidth and antenna counts, more intelligence will be applied to connection policy—network and band selection, congestion handling, weak-signal scheduling, and application-aware quality-of-service balanced against power and thermal constraints—so that user-perceived stability and latency consistency improve in real mobility. Connectivity will also converge with adjacent capabilities such as positioning, satellite fallback, multi-device continuity, and coordinated operation across handset, wearables, and vehicles, encouraging unified management across cellular and short-range radios at a higher software layer. Manufacturing advances will continue, but practical advantage will increasingly come from RF/antenna co-design, thermal management, and “industrializing” adaptation work—standardized validation frameworks, better observability and test automation, and reusable carrier-readiness tooling that compresses integration cycles and reduces surprise failures in late stages.

Drivers and constraints are tightly intertwined. Demand-side momentum comes from sustained expectations of reliable coverage and battery life, real application needs for lower latency and stronger uplink, and ongoing network evolution that creates incentives to upgrade devices and capabilities. On the supply side, device makers pursue differentiation and risk reduction through deeper vertical integration and multi-sourcing strategies, which reshapes partnerships and investment. Counterbalancing forces are significant: licensing and IP structures raise entry barriers and complicate economics; regulatory and carrier certification across regions expands engineering workload and elongates schedules; and the rising complexity of RF front-end components and antenna systems means end-device experience can lag behind silicon specs without extensive tuning and tight quality control in mass production. Geopolitical uncertainty and supply chain volatility add further risk around advanced process access, capacity, and critical materials. As a result, the market increasingly rewards players who can deliver repeatable, end-to-end engineering and ecosystem execution—not only strong silicon performance in isolation.

LP Information, Inc. (LPI) ' newest research report, the “Mobile Phone Mobile Broadband Modem Industry Forecast” looks at past sales and reviews total world Mobile Phone Mobile Broadband Modem sales in 2025, providing a comprehensive analysis by region and market sector of projected Mobile Phone Mobile Broadband Modem sales for 2026 through 2032. With Mobile Phone Mobile Broadband Modem sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Mobile Phone Mobile Broadband Modem industry.

This Insight Report provides a comprehensive analysis of the global Mobile Phone Mobile Broadband Modem 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 Mobile Phone Mobile Broadband Modem portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Mobile Phone Mobile Broadband Modem market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Mobile Phone Mobile Broadband Modem and breaks down the forecast by Type, 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 Mobile Phone Mobile Broadband Modem.

This report presents a comprehensive overview, market shares, and growth opportunities of Mobile Phone Mobile Broadband Modem market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

4G LTE Modem

5G NR Sub-6 Modem

5G NR mmWave Modem

Segmentation by Modem Architecture:

Discrete Modem

SoC-Integrated Modem

Segmentation by Performance:

Entry-Level

Mainstream

Flagship-Level

Segmentation by Application:

IOS System Mobile Phone

Android Mobile Phone

HarmonyOS Mobile Phone

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

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.

Qualcomm

MediaTek

Samsung

Huawei HiSilicon

Apple

UNISOC

Key Questions Addressed in this Report

What is the 10-year outlook for the global Mobile Phone Mobile Broadband Modem market?

What factors are driving Mobile Phone Mobile Broadband Modem market

growth, globally and by region?

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

How do Mobile Phone Mobile Broadband Modem market opportunities vary by end market size?

How does Mobile Phone Mobile Broadband Modem break out by Type, by Application?

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