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Global NB-IoT Modem Chip Market Growth 2026-2032

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Abstracts

The global NB-IoT Modem Chip market size is predicted to grow from US$ 449 million in 2025 to US$ 786 million in 2032; it is expected to grow at a CAGR of 8.5% from 2026 to 2032.

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

Key Findings

2025 global shipments were approximately 270 million units

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

China remained the largest production and application market

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

Market Trends

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

Market Dynamics

Drivers

Demand is supported by continued digitization of utility infrastructure, large-scale smart-meter replacement, expansion of municipal sensing systems and the need to migrate low-data-rate devices from legacy 2G and 3G networks. NB-IoT offers licensed-spectrum operation, operator-managed security, extended indoor coverage and long battery life, making it suitable for devices that transmit small data packets over long operating cycles. The global network foundation is already extensive: GSMA recorded 140 commercial NB-IoT networks by November 2025, while active NB-IoT and LTE-M connections together reached one billion at the end of 2025. This installed base

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supports continued demand for replacement chips, new module designs and application-specific platforms. Semiconductor integration is also improving project economics by reducing memory, RF, power-management and external MCU requirements, allowing terminal manufacturers to lower bill-of-materials cost and shorten hardware development cycles.

Restraints

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

Opportunities

The strongest opportunities are concentrated in application-specific integration, emerging-market infrastructure and terrestrial–satellite connectivity. Smart water, gas and electricity meters continue to offer substantial replacement and new-installation demand, while fire alarms, environmental sensors and municipal infrastructure create opportunities for optimized single-mode SoCs. In internationally deployed equipment, suppliers can capture higher semiconductor value by integrating dual-mode connectivity, GNSS, security, application processing and global band support. Release 17 NB-IoT NTN creates an additional pathway for connecting assets and sensors beyond terrestrial network coverage, including agricultural equipment, logistics assets, pipelines, remote energy infrastructure and environmental monitoring stations. Opportunities also exist in markets where 2G and 3G retirement requires redesign of low-data-rate devices, provided that chipset and module suppliers can achieve local operator certification and stable long-term supply. The expansion of NB-IoT from a standalone communication function toward an integrated low-power computing and

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connectivity platform can support higher value per device even as basic modem prices remain under pressure.

Challenges

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

Industry Chain Analysis

The upstream NB-IoT Modem Chip industry chain comprises cellular communication intellectual property, processor and security IP, EDA tools, semiconductor materials, wafer fabrication, RF components, memory and outsourced packaging and testing. Most specialist suppliers operate under a fabless model and depend on external foundries and assembly partners, while integrated device manufacturers may combine internal manufacturing with outsourced capacity. Upstream cost is influenced by process technology, die area, embedded memory, RF integration, package complexity, testing requirements and production volume. Although advanced process nodes are not always essential, power efficiency, RF performance and cost control require close coordination among architecture, process and packaging design.

The midstream segment consists of modem chipset, integrated SoC and semiconductor-grade SiP developers. Value creation is concentrated in protocol-stack maturity, baseband and RF integration, low-power architecture, security, band coverage,

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certification and software tools. Downstream participants integrate these products into communication modules, smart meters, trackers, industrial sensors and other connected devices before deployment through utilities, operators, equipment manufacturers and system integrators. Semiconductor suppliers with higher integration can capture more value by replacing external MCUs, memory, power-management devices or positioning chips, but they also carry greater development and certification costs. In high-volume single-mode products, profitability depends primarily on die cost, yield, packaging efficiency and shipment scale; in global dual-mode and SiP products, certification coverage, software support and functional integration have a greater influence on pricing.

Segment Insights

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

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

Downstream Market Opportunities

Smart metering remains the most important downstream opportunity because water, gas and electricity meters combine long field life, low reporting frequency, deep indoor installation and large deployment volumes. Future demand will increasingly come from

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

Regional Insights

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

India represents an important emerging opportunity, led by smart-meter programs, infrastructure digitalization and local electronics development, although chipset supply remains substantially dependent on international semiconductor platforms. Southeast Asia plays a growing role in packaging, module production and connected-device manufacturing but has limited independent NB-IoT modem IP. Future regional competition will therefore remain differentiated: China will lead cost-sensitive volume applications, while international suppliers will concentrate on global certification, high integration, dual-mode connectivity and NTN-enabled use cases.

Competitive Landscape Analysis

The competitive landscape consists of 16 confirmed core corporate groups and independent suppliers, with a clear separation between high-volume single-mode vendors and globally oriented integrated-platform companies. Chinese suppliers such as Huawei, UNISOC, XINYI, Eigencomm, ASR and other specialist developers compete

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primarily through cost optimization, local network adaptation, module partnerships and access to large smart-meter and municipal projects. International companies including Qualcomm, Sony, MediaTek, Nordic, Sequans and GCT place greater emphasis on multi-region certification, LTE-M and NB-IoT coexistence, global frequency support, integrated positioning, security and application processing. Semiconductor-grade SiP suppliers further differentiate through reduced terminal size and simplified RF design.

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

Report Scope

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

This Insight Report provides a comprehensive analysis of the global NB-IoT Modem Chip 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 NB-IoT Modem Chip portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global NB-IoT Modem Chip market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for NB-IoT Modem Chip and breaks down the forecast by

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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 NB-IoT Modem Chip.

This report presents a comprehensive overview, market shares, and growth opportunities of NB-IoT Modem Chip market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Standalone Modem Chipset

Integrated Modem SoC

Modem SoC with Application MCU

Semiconductor-Grade SiP

Segmentation by Cellular Mode Support:

Single-Mode NB-IoT

LTE-M / NB-IoT Dual-Mode

2G / NB-IoT Multi-Mode

Broadband LTE / NB-IoT Multi-Mode

Other

Segmentation by Power Consumption Class:

Ultra-Low-Power Battery Class

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Low-Power General Class

Performance-Oriented Class

Other

Segmentation by 3GPP Release Generation:

Release 13 Generation

Release 14 Generation

Release 15–16 Generation

Release 17 and Later Generation

Segmentation by Application:

Smart Metering

Smart City Sensing

Industrial Monitoring

Asset Tracking

Agriculture and Environmental Monitoring

Smart Home and Safety Devices

Other Applications

This report also splits the market by region:

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Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

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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.

Huawei Technologies Co., Ltd.

Qualcomm Incorporated

Sony Group Corporation

China Mobile Communications Group Co., Ltd.

MediaTek Inc.

Renesas Electronics Corporation

UNISOC (Shanghai) Technologies Co., Ltd.

Nordic Semiconductor ASA

Skyworks Solutions, Inc.

ASR Microelectronics Co., Ltd.

Sequans Communications S.A.

GCT Semiconductor, Inc.

XINYI Information Technology (Shanghai) Co., Ltd.

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Eigencomm

Trasna

Beijing Mlink Technology Inc.

Key Questions Addressed in this Report

What is the 10-year outlook for the global NB-IoT Modem Chip market?

What factors are driving NB-IoT Modem Chip market growth, globally and by region?

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

How do NB-IoT Modem Chip market opportunities vary by end market size?

How does NB-IoT Modem Chip break out by Type, 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 NB-IoT Modem Chip Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for NB-IoT Modem Chip by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for NB-IoT Modem Chip by Country/Region, 2021, 2025 & 2032
2.2 NB-IoT Modem Chip Segment by Type
  2.2.1 Standalone Modem Chipset
  2.2.2 Integrated Modem SoC
  2.2.3 Modem SoC with Application MCU
  2.2.4 Semiconductor-Grade SiP
  2.2.5 NB-IoT Modem Chip Sales by Type
    2.2.5.1 Global NB-IoT Modem Chip Sales Market Share by Type (2021-2026)
    2.2.5.2 Global NB-IoT Modem Chip Revenue and Market Share by Type (2021-2026)
    2.2.5.3 Global NB-IoT Modem Chip Sale Price by Type (2021-2026)
2.3 NB-IoT Modem Chip Segment by Cellular Mode Support
  2.3.1 Single-Mode NB-IoT
  2.3.2 LTE-M / NB-IoT Dual-Mode
  2.3.3 2G / NB-IoT Multi-Mode
  2.3.4 Broadband LTE / NB-IoT Multi-Mode
  2.3.5 Other
  2.3.6 NB-IoT Modem Chip Sales by Cellular Mode Support
    2.3.6.1 Global NB-IoT Modem Chip Sales Market Share by Cellular Mode Support (2021-2026)

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2.3.6.2 Global NB-IoT Modem Chip Revenue and Market Share by Cellular Mode Support (2021-2026)
2.3.6.3 Global NB-IoT Modem Chip Sale Price by Cellular Mode Support (2021-2026)
2.4 NB-IoT Modem Chip Segment by Power Consumption Class
2.4.1 Ultra-Low-Power Battery Class
2.4.2 Low-Power General Class
2.4.3 Performance-Oriented Class
2.4.4 Other
2.4.5 NB-IoT Modem Chip Sales by Power Consumption Class
2.4.5.1 Global NB-IoT Modem Chip Sales Market Share by Power Consumption Class (2021-2026)
2.4.5.2 Global NB-IoT Modem Chip Revenue and Market Share by Power Consumption Class (2021-2026)
2.4.5.3 Global NB-IoT Modem Chip Sale Price by Power Consumption Class (2021-2026)
2.5 NB-IoT Modem Chip Segment by 3GPP Release Generation
2.5.1 Release 13 Generation
2.5.2 Release 14 Generation
2.5.3 Release 15–16 Generation
2.5.4 Release 17 and Later Generation
2.5.5 NB-IoT Modem Chip Sales by 3GPP Release Generation
2.5.5.1 Global NB-IoT Modem Chip Sales Market Share by 3GPP Release Generation (2021-2026)
2.5.5.2 Global NB-IoT Modem Chip Revenue and Market Share by 3GPP Release Generation (2021-2026)
2.5.5.3 Global NB-IoT Modem Chip Sale Price by 3GPP Release Generation (2021-2026)
2.6 NB-IoT Modem Chip Segment by Application
2.6.1 Smart Metering
2.6.2 Smart City Sensing
2.6.3 Industrial Monitoring
2.6.4 Asset Tracking
2.6.5 Agriculture and Environmental Monitoring
2.6.6 Smart Home and Safety Devices
2.6.7 Other Applications
2.6.8 NB-IoT Modem Chip Sales by Application
2.6.8.1 Global NB-IoT Modem Chip Sale Market Share by Application (2021-2026)
2.6.8.2 Global NB-IoT Modem Chip Revenue and Market Share by Application (2021-2026)

+357 96 030922
info@marketpublishers.com

2.6.8.3 Global NB-IoT Modem Chip Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global NB-IoT Modem Chip Breakdown Data by Company
3.1.1 Global NB-IoT Modem Chip Annual Sales by Company (2021-2026)
3.1.2 Global NB-IoT Modem Chip Sales Market Share by Company (2021-2026)
3.2 Global NB-IoT Modem Chip Annual Revenue by Company (2021-2026)
3.2.1 Global NB-IoT Modem Chip Revenue by Company (2021-2026)
3.2.2 Global NB-IoT Modem Chip Revenue Market Share by Company (2021-2026)
3.3 Global NB-IoT Modem Chip Sale Price by Company
3.4 Key Manufacturers NB-IoT Modem Chip Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers NB-IoT Modem Chip Product Location Distribution
3.4.2 Players NB-IoT Modem Chip 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 NB-IOT MODEM CHIP BY GEOGRAPHIC REGION

4.1 World Historic NB-IoT Modem Chip Market Size by Geographic Region (2021-2026)
4.1.1 Global NB-IoT Modem Chip Annual Sales by Geographic Region (2021-2026)
4.1.2 Global NB-IoT Modem Chip Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic NB-IoT Modem Chip Market Size by Country/Region (2021-2026)
4.2.1 Global NB-IoT Modem Chip Annual Sales by Country/Region (2021-2026)
4.2.2 Global NB-IoT Modem Chip Annual Revenue by Country/Region (2021-2026)
4.3 Americas NB-IoT Modem Chip Sales Growth
4.4 APAC NB-IoT Modem Chip Sales Growth
4.5 Europe NB-IoT Modem Chip Sales Growth
4.6 Middle East & Africa NB-IoT Modem Chip Sales Growth

5 AMERICAS

5.1 Americas NB-IoT Modem Chip Sales by Country
5.1.1 Americas NB-IoT Modem Chip Sales by Country (2021-2026)

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info@marketpublishers.com

5.1.2 Americas NB-IoT Modem Chip Revenue by Country (2021-2026)
5.2 Americas NB-IoT Modem Chip Sales by Type (2021-2026)
5.3 Americas NB-IoT Modem Chip Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC NB-IoT Modem Chip Sales by Region
6.1.1 APAC NB-IoT Modem Chip Sales by Region (2021-2026)
6.1.2 APAC NB-IoT Modem Chip Revenue by Region (2021-2026)
6.2 APAC NB-IoT Modem Chip Sales by Type (2021-2026)
6.3 APAC NB-IoT Modem Chip 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 NB-IoT Modem Chip by Country
7.1.1 Europe NB-IoT Modem Chip Sales by Country (2021-2026)
7.1.2 Europe NB-IoT Modem Chip Revenue by Country (2021-2026)
7.2 Europe NB-IoT Modem Chip Sales by Type (2021-2026)
7.3 Europe NB-IoT Modem Chip 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 NB-IoT Modem Chip by Country

+357 96 030922
info@marketpublishers.com

8.1.1 Middle East & Africa NB-IoT Modem Chip Sales by Country (2021-2026)
8.1.2 Middle East & Africa NB-IoT Modem Chip Revenue by Country (2021-2026)
8.2 Middle East & Africa NB-IoT Modem Chip Sales by Type (2021-2026)
8.3 Middle East & Africa NB-IoT Modem Chip 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 NB-IoT Modem Chip
10.3 Manufacturing Process Analysis of NB-IoT Modem Chip
10.4 Industry Chain Structure of NB-IoT Modem Chip

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
11.1.1 Direct Channels
11.1.2 Indirect Channels
11.2 NB-IoT Modem Chip Distributors
11.3 NB-IoT Modem Chip Customer

12 WORLD FORECAST REVIEW FOR NB-IOT MODEM CHIP BY GEOGRAPHIC REGION

12.1 Global NB-IoT Modem Chip Market Size Forecast by Region
12.1.1 Global NB-IoT Modem Chip Forecast by Region (2027-2032)
12.1.2 Global NB-IoT Modem Chip Annual Revenue Forecast by Region (2027-2032)
12.2 Americas Forecast by Country (2027-2032)
12.3 APAC Forecast by Region (2027-2032)

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12.4 Europe Forecast by Country (2027-2032)
12.5 Middle East & Africa Forecast by Country (2027-2032)
12.6 Global NB-IoT Modem Chip Forecast by Type (2027-2032)
12.7 Global NB-IoT Modem Chip Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Huawei Technologies Co., Ltd.
13.1.1 Huawei Technologies Co., Ltd. Company Information
13.1.2 Huawei Technologies Co., Ltd. NB-IoT Modem Chip Product Portfolios and Specifications
13.1.3 Huawei Technologies Co., Ltd. NB-IoT Modem Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.1.4 Huawei Technologies Co., Ltd. Main Business Overview
13.1.5 Huawei Technologies Co., Ltd. Latest Developments
13.2 Qualcomm Incorporated
13.2.1 Qualcomm Incorporated Company Information
13.2.2 Qualcomm Incorporated NB-IoT Modem Chip Product Portfolios and Specifications
13.2.3 Qualcomm Incorporated NB-IoT Modem Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 Qualcomm Incorporated Main Business Overview
13.2.5 Qualcomm Incorporated Latest Developments
13.3 Sony Group Corporation
13.3.1 Sony Group Corporation Company Information
13.3.2 Sony Group Corporation NB-IoT Modem Chip Product Portfolios and Specifications
13.3.3 Sony Group Corporation NB-IoT Modem Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 Sony Group Corporation Main Business Overview
13.3.5 Sony Group Corporation Latest Developments
13.4 China Mobile Communications Group Co., Ltd.
13.4.1 China Mobile Communications Group Co., Ltd. Company Information
13.4.2 China Mobile Communications Group Co., Ltd. NB-IoT Modem Chip Product Portfolios and Specifications
13.4.3 China Mobile Communications Group Co., Ltd. NB-IoT Modem Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 China Mobile Communications Group Co., Ltd. Main Business Overview
13.4.5 China Mobile Communications Group Co., Ltd. Latest Developments

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info@marketpublishers.com

13.5 MediaTek Inc.
13.5.1 MediaTek Inc. Company Information
13.5.2 MediaTek Inc. NB-IoT Modem Chip Product Portfolios and Specifications
13.5.3 MediaTek Inc. NB-IoT Modem Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 MediaTek Inc. Main Business Overview
13.5.5 MediaTek Inc. Latest Developments
13.6 Renesas Electronics Corporation
13.6.1 Renesas Electronics Corporation Company Information
13.6.2 Renesas Electronics Corporation NB-IoT Modem Chip Product Portfolios and Specifications
13.6.3 Renesas Electronics Corporation NB-IoT Modem Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 Renesas Electronics Corporation Main Business Overview
13.6.5 Renesas Electronics Corporation Latest Developments
13.7 UNISOC (Shanghai) Technologies Co., Ltd.
13.7.1 UNISOC (Shanghai) Technologies Co., Ltd. Company Information
13.7.2 UNISOC (Shanghai) Technologies Co., Ltd. NB-IoT Modem Chip Product Portfolios and Specifications
13.7.3 UNISOC (Shanghai) Technologies Co., Ltd. NB-IoT Modem Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 UNISOC (Shanghai) Technologies Co., Ltd. Main Business Overview
13.7.5 UNISOC (Shanghai) Technologies Co., Ltd. Latest Developments
13.8 Nordic Semiconductor ASA
13.8.1 Nordic Semiconductor ASA Company Information
13.8.2 Nordic Semiconductor ASA NB-IoT Modem Chip Product Portfolios and Specifications
13.8.3 Nordic Semiconductor ASA NB-IoT Modem Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 Nordic Semiconductor ASA Main Business Overview
13.8.5 Nordic Semiconductor ASA Latest Developments
13.9 Skyworks Solutions, Inc.
13.9.1 Skyworks Solutions, Inc. Company Information
13.9.2 Skyworks Solutions, Inc. NB-IoT Modem Chip Product Portfolios and Specifications
13.9.3 Skyworks Solutions, Inc. NB-IoT Modem Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 Skyworks Solutions, Inc. Main Business Overview
13.9.5 Skyworks Solutions, Inc. Latest Developments

+357 96 030922
info@marketpublishers.com

13.10 ASR Microelectronics Co., Ltd.
13.10.1 ASR Microelectronics Co., Ltd. Company Information
13.10.2 ASR Microelectronics Co., Ltd. NB-IoT Modem Chip Product Portfolios and Specifications
13.10.3 ASR Microelectronics Co., Ltd. NB-IoT Modem Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 ASR Microelectronics Co., Ltd. Main Business Overview
13.10.5 ASR Microelectronics Co., Ltd. Latest Developments
13.11 Sequans Communications S.A.
13.11.1 Sequans Communications S.A. Company Information
13.11.2 Sequans Communications S.A. NB-IoT Modem Chip Product Portfolios and Specifications
13.11.3 Sequans Communications S.A. NB-IoT Modem Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 Sequans Communications S.A. Main Business Overview
13.11.5 Sequans Communications S.A. Latest Developments
13.12 GCT Semiconductor, Inc.
13.12.1 GCT Semiconductor, Inc. Company Information
13.12.2 GCT Semiconductor, Inc. NB-IoT Modem Chip Product Portfolios and Specifications
13.12.3 GCT Semiconductor, Inc. NB-IoT Modem Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.12.4 GCT Semiconductor, Inc. Main Business Overview
13.12.5 GCT Semiconductor, Inc. Latest Developments
13.13 XINYI Information Technology (Shanghai) Co., Ltd.
13.13.1 XINYI Information Technology (Shanghai) Co., Ltd. Company Information
13.13.2 XINYI Information Technology (Shanghai) Co., Ltd. NB-IoT Modem Chip Product Portfolios and Specifications
13.13.3 XINYI Information Technology (Shanghai) Co., Ltd. NB-IoT Modem Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.13.4 XINYI Information Technology (Shanghai) Co., Ltd. Main Business Overview
13.13.5 XINYI Information Technology (Shanghai) Co., Ltd. Latest Developments
13.14 Eigencomm
13.14.1 Eigencomm Company Information
13.14.2 Eigencomm NB-IoT Modem Chip Product Portfolios and Specifications
13.14.3 Eigencomm NB-IoT Modem Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.14.4 Eigencomm Main Business Overview
13.14.5 Eigencomm Latest Developments

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13.15 Trasna
13.15.1 Trasna Company Information
13.15.2 Trasna NB-IoT Modem Chip Product Portfolios and Specifications
13.15.3 Trasna NB-IoT Modem Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.15.4 Trasna Main Business Overview
13.15.5 Trasna Latest Developments
13.16 Beijing Mlink Technology Inc.
13.16.1 Beijing Mlink Technology Inc. Company Information
13.16.2 Beijing Mlink Technology Inc. NB-IoT Modem Chip Product Portfolios and Specifications
13.16.3 Beijing Mlink Technology Inc. NB-IoT Modem Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.16.4 Beijing Mlink Technology Inc. Main Business Overview
13.16.5 Beijing Mlink Technology Inc. Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

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List Of Tables

LIST OF TABLES

Table 1. NB-IoT Modem Chip Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. NB-IoT Modem Chip Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of Standalone Modem Chipset
Table 4. Major Players of Integrated Modem SoC
Table 5. Major Players of Modem SoC with Application MCU
Table 6. Major Players of Semiconductor-Grade SiP
Table 7. Global NB-IoT Modem Chip Sales by Type (2021-2026) & (Million Units)
Table 8. Global NB-IoT Modem Chip Sales Market Share by Type (2021-2026)
Table 9. Global NB-IoT Modem Chip Revenue by Type (2021-2026) & ($ million)
Table 10. Global NB-IoT Modem Chip Revenue Market Share by Type (2021-2026)
Table 11. Global NB-IoT Modem Chip Sale Price by Type (2021-2026) & (US$/Unit)
Table 12. Major Players of Single-Mode NB-IoT
Table 13. Major Players of LTE-M / NB-IoT Dual-Mode
Table 14. Major Players of 2G / NB-IoT Multi-Mode
Table 15. Major Players of Broadband LTE / NB-IoT Multi-Mode
Table 16. Major Players of Other
Table 17. Global NB-IoT Modem Chip Sales by Cellular Mode Support (2021-2026) & (Million Units)
Table 18. Global NB-IoT Modem Chip Sales Market Share by Cellular Mode Support (2021-2026)
Table 19. Global NB-IoT Modem Chip Revenue by Cellular Mode Support (2021-2026) & ($ million)
Table 20. Global NB-IoT Modem Chip Revenue Market Share by Cellular Mode Support (2021-2026)
Table 21. Global NB-IoT Modem Chip Sale Price by Cellular Mode Support (2021-2026) & (US$/Unit)
Table 22. Major Players of Ultra-Low-Power Battery Class
Table 23. Major Players of Low-Power General Class
Table 24. Major Players of Performance-Oriented Class
Table 25. Major Players of Other
Table 26. Global NB-IoT Modem Chip Sales by Power Consumption Class (2021-2026) & (Million Units)
Table 27. Global NB-IoT Modem Chip Sales Market Share by Power Consumption

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Class (2021-2026)
Table 28. Global NB-IoT Modem Chip Revenue by Power Consumption Class (2021-2026) & ($ million)
Table 29. Global NB-IoT Modem Chip Revenue Market Share by Power Consumption Class (2021-2026)
Table 30. Global NB-IoT Modem Chip Sale Price by Power Consumption Class (2021-2026) & (US$/Unit)
Table 31. Major Players of Release 13 Generation
Table 32. Major Players of Release 14 Generation
Table 33. Major Players of Release 15–16 Generation
Table 34. Major Players of Release 17 and Later Generation
Table 35. Global NB-IoT Modem Chip Sales by 3GPP Release Generation (2021-2026) & (Million Units)
Table 36. Global NB-IoT Modem Chip Sales Market Share by 3GPP Release Generation (2021-2026)
Table 37. Global NB-IoT Modem Chip Revenue by 3GPP Release Generation (2021-2026) & ($ million)
Table 38. Global NB-IoT Modem Chip Revenue Market Share by 3GPP Release Generation (2021-2026)
Table 39. Global NB-IoT Modem Chip Sale Price by 3GPP Release Generation (2021-2026) & (US$/Unit)
Table 40. Global NB-IoT Modem Chip Sale by Application (2021-2026) & (Million Units)
Table 41. Global NB-IoT Modem Chip Sale Market Share by Application (2021-2026)
Table 42. Global NB-IoT Modem Chip Revenue by Application (2021-2026) & ($ million)
Table 43. Global NB-IoT Modem Chip Revenue Market Share by Application (2021-2026)
Table 44. Global NB-IoT Modem Chip Sale Price by Application (2021-2026) & (US$/Unit)
Table 45. Global NB-IoT Modem Chip Sales by Company (2021-2026) & (Million Units)
Table 46. Global NB-IoT Modem Chip Sales Market Share by Company (2021-2026)
Table 47. Global NB-IoT Modem Chip Revenue by Company (2021-2026) & ($ millions)
Table 48. Global NB-IoT Modem Chip Revenue Market Share by Company (2021-2026)
Table 49. Global NB-IoT Modem Chip Sale Price by Company (2021-2026) & (US$/Unit)
Table 50. Key Manufacturers NB-IoT Modem Chip Producing Area Distribution and Sales Area
Table 51. Players NB-IoT Modem Chip Products Offered
Table 52. NB-IoT Modem Chip Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

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Table 53. New Products and Potential Entrants
Table 54. Market M&A Activity & Strategy
Table 55. Global NB-IoT Modem Chip Sales by Geographic Region (2021-2026) & (Million Units)
Table 56. Global NB-IoT Modem Chip Sales Market Share Geographic Region (2021-2026)
Table 57. Global NB-IoT Modem Chip Revenue by Geographic Region (2021-2026) & ($ millions)
Table 58. Global NB-IoT Modem Chip Revenue Market Share by Geographic Region (2021-2026)
Table 59. Global NB-IoT Modem Chip Sales by Country/Region (2021-2026) & (Million Units)
Table 60. Global NB-IoT Modem Chip Sales Market Share by Country/Region (2021-2026)
Table 61. Global NB-IoT Modem Chip Revenue by Country/Region (2021-2026) & ($ millions)
Table 62. Global NB-IoT Modem Chip Revenue Market Share by Country/Region (2021-2026)
Table 63. Americas NB-IoT Modem Chip Sales by Country (2021-2026) & (Million Units)
Table 64. Americas NB-IoT Modem Chip Sales Market Share by Country (2021-2026)
Table 65. Americas NB-IoT Modem Chip Revenue by Country (2021-2026) & ($ millions)
Table 66. Americas NB-IoT Modem Chip Sales by Type (2021-2026) & (Million Units)
Table 67. Americas NB-IoT Modem Chip Sales by Application (2021-2026) & (Million Units)
Table 68. APAC NB-IoT Modem Chip Sales by Region (2021-2026) & (Million Units)
Table 69. APAC NB-IoT Modem Chip Sales Market Share by Region (2021-2026)
Table 70. APAC NB-IoT Modem Chip Revenue by Region (2021-2026) & ($ millions)
Table 71. APAC NB-IoT Modem Chip Sales by Type (2021-2026) & (Million Units)
Table 72. APAC NB-IoT Modem Chip Sales by Application (2021-2026) & (Million Units)
Table 73. Europe NB-IoT Modem Chip Sales by Country (2021-2026) & (Million Units)
Table 74. Europe NB-IoT Modem Chip Revenue by Country (2021-2026) & ($ millions)
Table 75. Europe NB-IoT Modem Chip Sales by Type (2021-2026) & (Million Units)
Table 76. Europe NB-IoT Modem Chip Sales by Application (2021-2026) & (Million Units)
Table 77. Middle East & Africa NB-IoT Modem Chip Sales by Country (2021-2026) & (Million Units)
Table 78. Middle East & Africa NB-IoT Modem Chip Revenue Market Share by Country (2021-2026)

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Table 79. Middle East & Africa NB-IoT Modem Chip Sales by Type (2021-2026) & (Million Units)
Table 80. Middle East & Africa NB-IoT Modem Chip Sales by Application (2021-2026) & (Million Units)
Table 81. Key Market Drivers & Growth Opportunities of NB-IoT Modem Chip
Table 82. Key Market Challenges & Risks of NB-IoT Modem Chip
Table 83. Key Industry Trends of NB-IoT Modem Chip
Table 84. NB-IoT Modem Chip Raw Material
Table 85. Key Suppliers of Raw Materials
Table 86. NB-IoT Modem Chip Distributors List
Table 87. NB-IoT Modem Chip Customer List
Table 88. Global NB-IoT Modem Chip Sales Forecast by Region (2027-2032) & (Million Units)
Table 89. Global NB-IoT Modem Chip Revenue Forecast by Region (2027-2032) & ($ millions)
Table 90. Americas NB-IoT Modem Chip Sales Forecast by Country (2027-2032) & (Million Units)
Table 91. Americas NB-IoT Modem Chip Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 92. APAC NB-IoT Modem Chip Sales Forecast by Region (2027-2032) & (Million Units)
Table 93. APAC NB-IoT Modem Chip Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 94. Europe NB-IoT Modem Chip Sales Forecast by Country (2027-2032) & (Million Units)
Table 95. Europe NB-IoT Modem Chip Revenue Forecast by Country (2027-2032) & ($ millions)
Table 96. Middle East & Africa NB-IoT Modem Chip Sales Forecast by Country (2027-2032) & (Million Units)
Table 97. Middle East & Africa NB-IoT Modem Chip Revenue Forecast by Country (2027-2032) & ($ millions)
Table 98. Global NB-IoT Modem Chip Sales Forecast by Type (2027-2032) & (Million Units)
Table 99. Global NB-IoT Modem Chip Revenue Forecast by Type (2027-2032) & ($ millions)
Table 100. Global NB-IoT Modem Chip Sales Forecast by Application (2027-2032) & (Million Units)
Table 101. Global NB-IoT Modem Chip Revenue Forecast by Application (2027-2032) & ($ millions)

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Table 102. Huawei Technologies Co., Ltd. Basic Information, NB-IoT Modem Chip Manufacturing Base, Sales Area and Its Competitors
Table 103. Huawei Technologies Co., Ltd. NB-IoT Modem Chip Product Portfolios and Specifications
Table 104. Huawei Technologies Co., Ltd. NB-IoT Modem Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 105. Huawei Technologies Co., Ltd. Main Business
Table 106. Huawei Technologies Co., Ltd. Latest Developments
Table 107. Qualcomm Incorporated Basic Information, NB-IoT Modem Chip Manufacturing Base, Sales Area and Its Competitors
Table 108. Qualcomm Incorporated NB-IoT Modem Chip Product Portfolios and Specifications
Table 109. Qualcomm Incorporated NB-IoT Modem Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 110. Qualcomm Incorporated Main Business
Table 111. Qualcomm Incorporated Latest Developments
Table 112. Sony Group Corporation Basic Information, NB-IoT Modem Chip Manufacturing Base, Sales Area and Its Competitors
Table 113. Sony Group Corporation NB-IoT Modem Chip Product Portfolios and Specifications
Table 114. Sony Group Corporation NB-IoT Modem Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 115. Sony Group Corporation Main Business
Table 116. Sony Group Corporation Latest Developments
Table 117. China Mobile Communications Group Co., Ltd. Basic Information, NB-IoT Modem Chip Manufacturing Base, Sales Area and Its Competitors
Table 118. China Mobile Communications Group Co., Ltd. NB-IoT Modem Chip Product Portfolios and Specifications
Table 119. China Mobile Communications Group Co., Ltd. NB-IoT Modem Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 120. China Mobile Communications Group Co., Ltd. Main Business
Table 121. China Mobile Communications Group Co., Ltd. Latest Developments
Table 122. MediaTek Inc. Basic Information, NB-IoT Modem Chip Manufacturing Base, Sales Area and Its Competitors
Table 123. MediaTek Inc. NB-IoT Modem Chip Product Portfolios and Specifications
Table 124. MediaTek Inc. NB-IoT Modem Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 125. MediaTek Inc. Main Business
Table 126. MediaTek Inc. Latest Developments

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Table 127. Renesas Electronics Corporation Basic Information, NB-IoT Modem Chip Manufacturing Base, Sales Area and Its Competitors
Table 128. Renesas Electronics Corporation NB-IoT Modem Chip Product Portfolios and Specifications
Table 129. Renesas Electronics Corporation NB-IoT Modem Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 130. Renesas Electronics Corporation Main Business
Table 131. Renesas Electronics Corporation Latest Developments
Table 132. UNISOC (Shanghai) Technologies Co., Ltd. Basic Information, NB-IoT Modem Chip Manufacturing Base, Sales Area and Its Competitors
Table 133. UNISOC (Shanghai) Technologies Co., Ltd. NB-IoT Modem Chip Product Portfolios and Specifications
Table 134. UNISOC (Shanghai) Technologies Co., Ltd. NB-IoT Modem Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 135. UNISOC (Shanghai) Technologies Co., Ltd. Main Business
Table 136. UNISOC (Shanghai) Technologies Co., Ltd. Latest Developments
Table 137. Nordic Semiconductor ASA Basic Information, NB-IoT Modem Chip Manufacturing Base, Sales Area and Its Competitors
Table 138. Nordic Semiconductor ASA NB-IoT Modem Chip Product Portfolios and Specifications
Table 139. Nordic Semiconductor ASA NB-IoT Modem Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 140. Nordic Semiconductor ASA Main Business
Table 141. Nordic Semiconductor ASA Latest Developments
Table 142. Skyworks Solutions, Inc. Basic Information, NB-IoT Modem Chip Manufacturing Base, Sales Area and Its Competitors
Table 143. Skyworks Solutions, Inc. NB-IoT Modem Chip Product Portfolios and Specifications
Table 144. Skyworks Solutions, Inc. NB-IoT Modem Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 145. Skyworks Solutions, Inc. Main Business
Table 146. Skyworks Solutions, Inc. Latest Developments
Table 147. ASR Microelectronics Co., Ltd. Basic Information, NB-IoT Modem Chip Manufacturing Base, Sales Area and Its Competitors
Table 148. ASR Microelectronics Co., Ltd. NB-IoT Modem Chip Product Portfolios and Specifications
Table 149. ASR Microelectronics Co., Ltd. NB-IoT Modem Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 150. ASR Microelectronics Co., Ltd. Main Business

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Table 151. ASR Microelectronics Co., Ltd. Latest Developments
Table 152. Sequans Communications S.A. Basic Information, NB-IoT Modem Chip Manufacturing Base, Sales Area and Its Competitors
Table 153. Sequans Communications S.A. NB-IoT Modem Chip Product Portfolios and Specifications
Table 154. Sequans Communications S.A. NB-IoT Modem Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 155. Sequans Communications S.A. Main Business
Table 156. Sequans Communications S.A. Latest Developments
Table 157. GCT Semiconductor, Inc. Basic Information, NB-IoT Modem Chip Manufacturing Base, Sales Area and Its Competitors
Table 158. GCT Semiconductor, Inc. NB-IoT Modem Chip Product Portfolios and Specifications
Table 159. GCT Semiconductor, Inc. NB-IoT Modem Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 160. GCT Semiconductor, Inc. Main Business
Table 161. GCT Semiconductor, Inc. Latest Developments
Table 162. XINYI Information Technology (Shanghai) Co., Ltd. Basic Information, NB-IoT Modem Chip Manufacturing Base, Sales Area and Its Competitors
Table 163. XINYI Information Technology (Shanghai) Co., Ltd. NB-IoT Modem Chip Product Portfolios and Specifications
Table 164. XINYI Information Technology (Shanghai) Co., Ltd. NB-IoT Modem Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 165. XINYI Information Technology (Shanghai) Co., Ltd. Main Business
Table 166. XINYI Information Technology (Shanghai) Co., Ltd. Latest Developments
Table 167. Eigencomm Basic Information, NB-IoT Modem Chip Manufacturing Base, Sales Area and Its Competitors
Table 168. Eigencomm NB-IoT Modem Chip Product Portfolios and Specifications
Table 169. Eigencomm NB-IoT Modem Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 170. Eigencomm Main Business
Table 171. Eigencomm Latest Developments
Table 172. Trasna Basic Information, NB-IoT Modem Chip Manufacturing Base, Sales Area and Its Competitors
Table 173. Trasna NB-IoT Modem Chip Product Portfolios and Specifications
Table 174. Trasna NB-IoT Modem Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 175. Trasna Main Business

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Table 176. Trasna Latest Developments
Table 177. Beijing Mlink Technology Inc. Basic Information, NB-IoT Modem Chip Manufacturing Base, Sales Area and Its Competitors
Table 178. Beijing Mlink Technology Inc. NB-IoT Modem Chip Product Portfolios and Specifications
Table 179. Beijing Mlink Technology Inc. NB-IoT Modem Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 180. Beijing Mlink Technology Inc. Main Business
Table 181. Beijing Mlink Technology Inc. Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of NB-IoT Modem Chip
Figure 2. NB-IoT Modem Chip Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global NB-IoT Modem Chip Sales Growth Rate 2021-2032 (Million Units)
Figure 7. Global NB-IoT Modem Chip Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. NB-IoT Modem Chip Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. NB-IoT Modem Chip Sales Market Share by Country/Region (2025)
Figure 10. NB-IoT Modem Chip Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of Standalone Modem Chipset
Figure 12. Product Picture of Integrated Modem SoC
Figure 13. Product Picture of Modem SoC with Application MCU
Figure 14. Product Picture of Semiconductor-Grade SiP
Figure 15. Global NB-IoT Modem Chip Sales Market Share by Type in 2026
Figure 16. Global NB-IoT Modem Chip Revenue Market Share by Type (2021-2026)
Figure 17. Product Picture of Single-Mode NB-IoT
Figure 18. Product Picture of LTE-M / NB-IoT Dual-Mode
Figure 19. Product Picture of 2G / NB-IoT Multi-Mode
Figure 20. Product Picture of Broadband LTE / NB-IoT Multi-Mode
Figure 21. Product Picture of Other
Figure 22. Global NB-IoT Modem Chip Sales Market Share by Cellular Mode Support in 2026
Figure 23. Global NB-IoT Modem Chip Revenue Market Share by Cellular Mode Support (2021-2026)
Figure 24. Product Picture of Ultra-Low-Power Battery Class
Figure 25. Product Picture of Low-Power General Class
Figure 26. Product Picture of Performance-Oriented Class
Figure 27. Product Picture of Other
Figure 28. Global NB-IoT Modem Chip Sales Market Share by Power Consumption Class in 2026
Figure 29. Global NB-IoT Modem Chip Revenue Market Share by Power Consumption Class (2021-2026)

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Figure 30. Product Picture of Release 13 Generation
Figure 31. Product Picture of Release 14 Generation
Figure 32. Product Picture of Release 15–16 Generation
Figure 33. Product Picture of Release 17 and Later Generation
Figure 34. Global NB-IoT Modem Chip Sales Market Share by 3GPP Release Generation in 2026
Figure 35. Global NB-IoT Modem Chip Revenue Market Share by 3GPP Release Generation (2021-2026)
Figure 36. NB-IoT Modem Chip Consumed in Smart Metering
Figure 37. Global NB-IoT Modem Chip Market: Smart Metering (2021-2026) & (Million Units)
Figure 38. NB-IoT Modem Chip Consumed in Smart City Sensing
Figure 39. Global NB-IoT Modem Chip Market: Smart City Sensing (2021-2026) & (Million Units)
Figure 40. NB-IoT Modem Chip Consumed in Industrial Monitoring
Figure 41. Global NB-IoT Modem Chip Market: Industrial Monitoring (2021-2026) & (Million Units)
Figure 42. NB-IoT Modem Chip Consumed in Asset Tracking
Figure 43. Global NB-IoT Modem Chip Market: Asset Tracking (2021-2026) & (Million Units)
Figure 44. NB-IoT Modem Chip Consumed in Agriculture and Environmental Monitoring
Figure 45. Global NB-IoT Modem Chip Market: Agriculture and Environmental Monitoring (2021-2026) & (Million Units)
Figure 46. NB-IoT Modem Chip Consumed in Smart Home and Safety Devices
Figure 47. Global NB-IoT Modem Chip Market: Smart Home and Safety Devices (2021-2026) & (Million Units)
Figure 48. NB-IoT Modem Chip Consumed in Other Applications
Figure 49. Global NB-IoT Modem Chip Market: Other Applications (2021-2026) & (Million Units)
Figure 50. Global NB-IoT Modem Chip Sale Market Share by Application (2025)
Figure 51. Global NB-IoT Modem Chip Revenue Market Share by Application in 2025
Figure 52. NB-IoT Modem Chip Sales by Company in 2025 (Million Units)
Figure 53. Global NB-IoT Modem Chip Sales Market Share by Company in 2025
Figure 54. NB-IoT Modem Chip Revenue by Company in 2025 ($ millions)
Figure 55. Global NB-IoT Modem Chip Revenue Market Share by Company in 2025
Figure 56. Global NB-IoT Modem Chip Sales Market Share by Geographic Region (2021-2026)
Figure 57. Global NB-IoT Modem Chip Revenue Market Share by Geographic Region in 2025

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Figure 58. Americas NB-IoT Modem Chip Sales 2021-2026 (Million Units)
Figure 59. Americas NB-IoT Modem Chip Revenue 2021-2026 ($ millions)
Figure 60. APAC NB-IoT Modem Chip Sales 2021-2026 (Million Units)
Figure 61. APAC NB-IoT Modem Chip Revenue 2021-2026 ($ millions)
Figure 62. Europe NB-IoT Modem Chip Sales 2021-2026 (Million Units)
Figure 63. Europe NB-IoT Modem Chip Revenue 2021-2026 ($ millions)
Figure 64. Middle East & Africa NB-IoT Modem Chip Sales 2021-2026 (Million Units)
Figure 65. Middle East & Africa NB-IoT Modem Chip Revenue 2021-2026 ($ millions)
Figure 66. Americas NB-IoT Modem Chip Sales Market Share by Country in 2025
Figure 67. Americas NB-IoT Modem Chip Revenue Market Share by Country (2021-2026)
Figure 68. Americas NB-IoT Modem Chip Sales Market Share by Type (2021-2026)
Figure 69. Americas NB-IoT Modem Chip Sales Market Share by Application (2021-2026)
Figure 70. United States NB-IoT Modem Chip Revenue Growth 2021-2026 ($ millions)
Figure 71. Canada NB-IoT Modem Chip Revenue Growth 2021-2026 ($ millions)
Figure 72. Mexico NB-IoT Modem Chip Revenue Growth 2021-2026 ($ millions)
Figure 73. Brazil NB-IoT Modem Chip Revenue Growth 2021-2026 ($ millions)
Figure 74. APAC NB-IoT Modem Chip Sales Market Share by Region in 2025
Figure 75. APAC NB-IoT Modem Chip Revenue Market Share by Region (2021-2026)
Figure 76. APAC NB-IoT Modem Chip Sales Market Share by Type (2021-2026)
Figure 77. APAC NB-IoT Modem Chip Sales Market Share by Application (2021-2026)
Figure 78. China NB-IoT Modem Chip Revenue Growth 2021-2026 ($ millions)
Figure 79. Japan NB-IoT Modem Chip Revenue Growth 2021-2026 ($ millions)
Figure 80. South Korea NB-IoT Modem Chip Revenue Growth 2021-2026 ($ millions)
Figure 81. Southeast Asia NB-IoT Modem Chip Revenue Growth 2021-2026 ($ millions)
Figure 82. India NB-IoT Modem Chip Revenue Growth 2021-2026 ($ millions)
Figure 83. Australia NB-IoT Modem Chip Revenue Growth 2021-2026 ($ millions)
Figure 84. China Taiwan NB-IoT Modem Chip Revenue Growth 2021-2026 ($ millions)
Figure 85. Europe NB-IoT Modem Chip Sales Market Share by Country in 2025
Figure 86. Europe NB-IoT Modem Chip Revenue Market Share by Country (2021-2026)
Figure 87. Europe NB-IoT Modem Chip Sales Market Share by Type (2021-2026)
Figure 88. Europe NB-IoT Modem Chip Sales Market Share by Application (2021-2026)
Figure 89. Germany NB-IoT Modem Chip Revenue Growth 2021-2026 ($ millions)
Figure 90. France NB-IoT Modem Chip Revenue Growth 2021-2026 ($ millions)
Figure 91. UK NB-IoT Modem Chip Revenue Growth 2021-2026 ($ millions)
Figure 92. Italy NB-IoT Modem Chip Revenue Growth 2021-2026 ($ millions)
Figure 93. Russia NB-IoT Modem Chip Revenue Growth 2021-2026 ($ millions)
Figure 94. Middle East & Africa NB-IoT Modem Chip Sales Market Share by Country

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(2021-2026)
Figure 95. Middle East & Africa NB-IoT Modem Chip Sales Market Share by Type (2021-2026)
Figure 96. Middle East & Africa NB-IoT Modem Chip Sales Market Share by Application (2021-2026)
Figure 97. Egypt NB-IoT Modem Chip Revenue Growth 2021-2026 ($ millions)
Figure 98. South Africa NB-IoT Modem Chip Revenue Growth 2021-2026 ($ millions)
Figure 99. Israel NB-IoT Modem Chip Revenue Growth 2021-2026 ($ millions)
Figure 100. Turkey NB-IoT Modem Chip Revenue Growth 2021-2026 ($ millions)
Figure 101. GCC Countries NB-IoT Modem Chip Revenue Growth 2021-2026 ($ millions)
Figure 102. Manufacturing Cost Structure Analysis of NB-IoT Modem Chip in 2026
Figure 103. Manufacturing Process Analysis of NB-IoT Modem Chip
Figure 104. Industry Chain Structure of NB-IoT Modem Chip
Figure 105. Channels of Distribution
Figure 106. Global NB-IoT Modem Chip Sales Market Forecast by Region (2027-2032)
Figure 107. Global NB-IoT Modem Chip Revenue Market Share Forecast by Region (2027-2032)
Figure 108. Global NB-IoT Modem Chip Sales Market Share Forecast by Type (2027-2032)
Figure 109. Global NB-IoT Modem Chip Revenue Market Share Forecast by Type (2027-2032)
Figure 110. Global NB-IoT Modem Chip Sales Market Share Forecast by Application (2027-2032)
Figure 111. Global NB-IoT Modem Chip Revenue Market Share Forecast by Application (2027-2032)

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