

Global Non-Cellular IoT Chips Market Growth 2026-2032

<https://marketpublishers.com/r/GA16D7B0B65CEN.html>

Date: June 2026

Pages: 153

Price: US\$ 3,660.00 (Single User License)

ID: GA16D7B0B65CEN

Abstracts

The global Non - Cellular IoT Chips market size is predicted to grow from US\$ 12594 million in 2025 to US\$ 36166 million in 2032; it is expected to grow at a CAGR of 16.8% from 2026 to 2032.

Non-Cellular IoT chips refer to IoT communication chips used to support non-cellular wireless networks. Unlike cellular IoT chips, non-cellular IoT chips do not rely on mobile operator network infrastructure, but instead communicate between devices via local area networks (LANs) or other short-range wireless protocols. Non-cellular IoT chips are widely used for low-power, short-range communication between IoT devices, suitable for scenarios such as smart homes, industrial automation, agricultural monitoring, and health devices. In 2025, global production of non-cellular IoT chips reached 4839.96 million units, with an average price of approximately US\$2.66 per unit and a gross profit margin of 20.05%-55.26%. Downstream customers include Apple, Google, Amazon, Xiaomi, Logitech, Lenovo, Skyworth, Changhong, Haier, JBL, Sony, and Narwal.

From a competitive landscape perspective, core non-cellular IoT chip manufacturers mainly include Qualcomm, Texas Instruments, Nordic Semiconductor, and Renesas Electronics, while also covering key players such as Broadcom, MediaTek, Realtek, NXP, Infineon, and STMicroelectronics. In 2024, industry concentration was high, with the top ten manufacturers accounting for approximately 71.0% of the market share. The top tier globally consisted mainly of Broadcom, Qualcomm, and MediaTek, holding approximately 30.2% of the market share; the second tier included Realtek, NXP, Infineon, and Renesas Electronics, holding approximately 27.0% of the market share. As leading manufacturers continue to strengthen their advantages in multi-protocol platform SoCs, ecosystems and channels, and customer certification systems, market share will continue to concentrate on the top players in the short term. However, in high-

growth regions like China, structural substitution will accelerate the redistribution of market share. From a regional perspective, the Chinese market is one of the core variables determining global economic conditions and market share changes. The robust consumer market will further accelerate local supply chain collaboration and the pace of domestic substitution, making the Chinese market one of the most competitive and fastest-evolving regions for products in the coming years. In terms of product types and technological evolution, Bluetooth and Bluetooth Low Energy (BLE) remain the dominant technologies, with their advantages lying in ultra-low power consumption and a mature ecosystem. Meanwhile, the market share of Wi-Fi IoT continues to rise, primarily benefiting from the growth in direct network connectivity and higher bandwidth demands. Multi-protocol interconnection, represented by Zigbee/Thread/Matter, is steadily increasing its market share under the trend of "platformization" in smart homes. From an application perspective, smart homes remain the core scenario for large-scale deployment and will continue to benefit from home network upgrades, increased demand for cross-brand interconnection, and the penetration of multi-protocol SoCs. Overall, industry competition will intensify in the coming years, especially in the Chinese market, where price, delivery, and ecosystem integration will jointly determine market share changes. Long-term winners will primarily depend on low power consumption and RF performance, protocol stacks and software ecosystems, the efficiency of platform-based product iteration, and the ability to replicate success on a large scale with leading customers and channel systems.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Non - Cellular IoT Chips 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 Non - Cellular IoT Chips.

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

Segmentation by Type:

BLE

Wi-Fi IoT

Zigbee/Thread/Matter

Others

Segmentation by Integration:

Single-mode

Multi-mode

Segmentation by Technology:

Short Range

Long Range

Segmentation by Application:

Smart Home

Smart Healthcare

Retail Logistics

Consumer Electronics

Automotive Electronics

Other

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.

Broadcomm

Qualcomm

Texas Instruments

Nordic Semiconductor

Renesas Electronics (Dialog Semiconductor)

Silicon Labs

NXP Semiconductors

STMicroelectronics

Realtek Semiconductor Corporation

Infineon

Microchip Technology

Toshiba

Onsemi

MediaTek

Qorvo

UNISOC

Telink Semiconductor (shanghai)co.,ltd.

Shenzhen HiSilicon Technologies

ASR Microelectronics Co., Ltd.

Zhuhai All Winner Technology

Espressif Systems

Beken Corporation

Key Questions Addressed in this Report

What is the 10-year outlook for the global Non - Cellular IoT Chips market?

What factors are driving Non - Cellular IoT Chips market growth, globally and by region?

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

How do Non - Cellular IoT Chips market opportunities vary by end market size?

How does Non - Cellular IoT Chips break out by Type, by Application?

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 Non - Cellular IoT Chips Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Non - Cellular IoT Chips by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Non - Cellular IoT Chips by Country/Region, 2021, 2025 & 2032

2.2 Non - Cellular IoT Chips Segment by Type

- 2.2.1 BLE
- 2.2.2 Wi-Fi IoT
- 2.2.3 Zigbee/Thread/Matter
- 2.2.4 Others
- 2.2.5 Non - Cellular IoT Chips Sales by Type
 - 2.2.5.1 Global Non - Cellular IoT Chips Sales Market Share by Type (2021-2026)
 - 2.2.5.2 Global Non - Cellular IoT Chips Revenue and Market Share by Type (2021-2026)
 - 2.2.5.3 Global Non - Cellular IoT Chips Sale Price by Type (2021-2026)

2.3 Non - Cellular IoT Chips Segment by Integration

- 2.3.1 Single-mode
- 2.3.2 Multi-mode
- 2.3.3 Non - Cellular IoT Chips Sales by Integration
 - 2.3.3.1 Global Non - Cellular IoT Chips Sales Market Share by Integration (2021-2026)
 - 2.3.3.2 Global Non - Cellular IoT Chips Revenue and Market Share by Integration (2021-2026)

- 2.3.3.3 Global Non - Cellular IoT Chips Sale Price by Integration (2021-2026)
- 2.4 Non - Cellular IoT Chips Segment by Technology
 - 2.4.1 Short Range
 - 2.4.2 Long Range
 - 2.4.3 Non - Cellular IoT Chips Sales by Technology
 - 2.4.3.1 Global Non - Cellular IoT Chips Sales Market Share by Technology (2021-2026)
 - 2.4.3.2 Global Non - Cellular IoT Chips Revenue and Market Share by Technology (2021-2026)
 - 2.4.3.3 Global Non - Cellular IoT Chips Sale Price by Technology (2021-2026)
- 2.5 Non - Cellular IoT Chips Segment by Application
 - 2.5.1 Smart Home
 - 2.5.2 Smart Healthcare
 - 2.5.3 Retail Logistics
 - 2.5.4 Consumer Electronics
 - 2.5.5 Automotive Electronics
 - 2.5.6 Other
 - 2.5.7 Non - Cellular IoT Chips Sales by Application
 - 2.5.7.1 Global Non - Cellular IoT Chips Sale Market Share by Application (2021-2026)
 - 2.5.7.2 Global Non - Cellular IoT Chips Revenue and Market Share by Application (2021-2026)
 - 2.5.7.3 Global Non - Cellular IoT Chips Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

- 3.1 Global Non - Cellular IoT Chips Breakdown Data by Company
 - 3.1.1 Global Non - Cellular IoT Chips Annual Sales by Company (2021-2026)
 - 3.1.2 Global Non - Cellular IoT Chips Sales Market Share by Company (2021-2026)
- 3.2 Global Non - Cellular IoT Chips Annual Revenue by Company (2021-2026)
 - 3.2.1 Global Non - Cellular IoT Chips Revenue by Company (2021-2026)
 - 3.2.2 Global Non - Cellular IoT Chips Revenue Market Share by Company (2021-2026)
- 3.3 Global Non - Cellular IoT Chips Sale Price by Company
- 3.4 Key Manufacturers Non - Cellular IoT Chips Producing Area Distribution, Sales Area, Product Type
 - 3.4.1 Key Manufacturers Non - Cellular IoT Chips Product Location Distribution
 - 3.4.2 Players Non - Cellular IoT Chips 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 NON - CELLULAR IOT CHIPS BY GEOGRAPHIC REGION

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

5 AMERICAS

- 5.1 Americas Non - Cellular IoT Chips Sales by Country
 - 5.1.1 Americas Non - Cellular IoT Chips Sales by Country (2021-2026)
 - 5.1.2 Americas Non - Cellular IoT Chips Revenue by Country (2021-2026)
- 5.2 Americas Non - Cellular IoT Chips Sales by Type (2021-2026)
- 5.3 Americas Non - Cellular IoT Chips Sales by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

6 APAC

- 6.1 APAC Non - Cellular IoT Chips Sales by Region
 - 6.1.1 APAC Non - Cellular IoT Chips Sales by Region (2021-2026)
 - 6.1.2 APAC Non - Cellular IoT Chips Revenue by Region (2021-2026)

- 6.2 APAC Non - Cellular IoT Chips Sales by Type (2021-2026)
- 6.3 APAC Non - Cellular IoT Chips 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 Non - Cellular IoT Chips by Country
 - 7.1.1 Europe Non - Cellular IoT Chips Sales by Country (2021-2026)
 - 7.1.2 Europe Non - Cellular IoT Chips Revenue by Country (2021-2026)
- 7.2 Europe Non - Cellular IoT Chips Sales by Type (2021-2026)
- 7.3 Europe Non - Cellular IoT Chips 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 Non - Cellular IoT Chips by Country
 - 8.1.1 Middle East & Africa Non - Cellular IoT Chips Sales by Country (2021-2026)
 - 8.1.2 Middle East & Africa Non - Cellular IoT Chips Revenue by Country (2021-2026)
- 8.2 Middle East & Africa Non - Cellular IoT Chips Sales by Type (2021-2026)
- 8.3 Middle East & Africa Non - Cellular IoT Chips 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 Non - Cellular IoT Chips

10.3 Manufacturing Process Analysis of Non - Cellular IoT Chips

10.4 Industry Chain Structure of Non - Cellular IoT Chips

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Non - Cellular IoT Chips Distributors

11.3 Non - Cellular IoT Chips Customer

12 WORLD FORECAST REVIEW FOR NON - CELLULAR IOT CHIPS BY GEOGRAPHIC REGION

12.1 Global Non - Cellular IoT Chips Market Size Forecast by Region

12.1.1 Global Non - Cellular IoT Chips Forecast by Region (2027-2032)

12.1.2 Global Non - Cellular IoT Chips 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 Non - Cellular IoT Chips Forecast by Type (2027-2032)

12.7 Global Non - Cellular IoT Chips Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Broadcomm

13.1.1 Broadcomm Company Information

13.1.2 Broadcomm Non - Cellular IoT Chips Product Portfolios and Specifications

13.1.3 Broadcomm Non - Cellular IoT Chips Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.1.4 Broadcom Main Business Overview
- 13.1.5 Broadcom Latest Developments
- 13.2 Qualcomm
 - 13.2.1 Qualcomm Company Information
 - 13.2.2 Qualcomm Non - Cellular IoT Chips Product Portfolios and Specifications
 - 13.2.3 Qualcomm Non - Cellular IoT Chips Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.2.4 Qualcomm Main Business Overview
 - 13.2.5 Qualcomm Latest Developments
- 13.3 Texas Instruments
 - 13.3.1 Texas Instruments Company Information
 - 13.3.2 Texas Instruments Non - Cellular IoT Chips Product Portfolios and Specifications
 - 13.3.3 Texas Instruments Non - Cellular IoT Chips Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.3.4 Texas Instruments Main Business Overview
 - 13.3.5 Texas Instruments Latest Developments
- 13.4 Nordic Semiconductor
 - 13.4.1 Nordic Semiconductor Company Information
 - 13.4.2 Nordic Semiconductor Non - Cellular IoT Chips Product Portfolios and Specifications
 - 13.4.3 Nordic Semiconductor Non - Cellular IoT Chips Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.4.4 Nordic Semiconductor Main Business Overview
 - 13.4.5 Nordic Semiconductor Latest Developments
- 13.5 Renesas Electronics (Dialog Semiconductor)
 - 13.5.1 Renesas Electronics (Dialog Semiconductor) Company Information
 - 13.5.2 Renesas Electronics (Dialog Semiconductor) Non - Cellular IoT Chips Product Portfolios and Specifications
 - 13.5.3 Renesas Electronics (Dialog Semiconductor) Non - Cellular IoT Chips Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.5.4 Renesas Electronics (Dialog Semiconductor) Main Business Overview
 - 13.5.5 Renesas Electronics (Dialog Semiconductor) Latest Developments
- 13.6 Silicon Labs
 - 13.6.1 Silicon Labs Company Information
 - 13.6.2 Silicon Labs Non - Cellular IoT Chips Product Portfolios and Specifications
 - 13.6.3 Silicon Labs Non - Cellular IoT Chips Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.6.4 Silicon Labs Main Business Overview

- 13.6.5 Silicon Labs Latest Developments
- 13.7 NXP Semiconductors
 - 13.7.1 NXP Semiconductors Company Information
 - 13.7.2 NXP Semiconductors Non - Cellular IoT Chips Product Portfolios and Specifications
 - 13.7.3 NXP Semiconductors Non - Cellular IoT Chips Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.7.4 NXP Semiconductors Main Business Overview
 - 13.7.5 NXP Semiconductors Latest Developments
- 13.8 STMicroelectronics
 - 13.8.1 STMicroelectronics Company Information
 - 13.8.2 STMicroelectronics Non - Cellular IoT Chips Product Portfolios and Specifications
 - 13.8.3 STMicroelectronics Non - Cellular IoT Chips Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.8.4 STMicroelectronics Main Business Overview
 - 13.8.5 STMicroelectronics Latest Developments
- 13.9 Realtek Semiconductor Corporation
 - 13.9.1 Realtek Semiconductor Corporation Company Information
 - 13.9.2 Realtek Semiconductor Corporation Non - Cellular IoT Chips Product Portfolios and Specifications
 - 13.9.3 Realtek Semiconductor Corporation Non - Cellular IoT Chips Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.9.4 Realtek Semiconductor Corporation Main Business Overview
 - 13.9.5 Realtek Semiconductor Corporation Latest Developments
- 13.10 Infineon
 - 13.10.1 Infineon Company Information
 - 13.10.2 Infineon Non - Cellular IoT Chips Product Portfolios and Specifications
 - 13.10.3 Infineon Non - Cellular IoT Chips Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.10.4 Infineon Main Business Overview
 - 13.10.5 Infineon Latest Developments
- 13.11 Microchip Technology
 - 13.11.1 Microchip Technology Company Information
 - 13.11.2 Microchip Technology Non - Cellular IoT Chips Product Portfolios and Specifications
 - 13.11.3 Microchip Technology Non - Cellular IoT Chips Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.11.4 Microchip Technology Main Business Overview

13.11.5 Microchip Technology Latest Developments

13.12 Toshiba

13.12.1 Toshiba Company Information

13.12.2 Toshiba Non - Cellular IoT Chips Product Portfolios and Specifications

13.12.3 Toshiba Non - Cellular IoT Chips Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 Toshiba Main Business Overview

13.12.5 Toshiba Latest Developments

13.13 Onsemi

13.13.1 Onsemi Company Information

13.13.2 Onsemi Non - Cellular IoT Chips Product Portfolios and Specifications

13.13.3 Onsemi Non - Cellular IoT Chips Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 Onsemi Main Business Overview

13.13.5 Onsemi Latest Developments

13.14 MediaTek

13.14.1 MediaTek Company Information

13.14.2 MediaTek Non - Cellular IoT Chips Product Portfolios and Specifications

13.14.3 MediaTek Non - Cellular IoT Chips Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 MediaTek Main Business Overview

13.14.5 MediaTek Latest Developments

13.15 Qorvo

13.15.1 Qorvo Company Information

13.15.2 Qorvo Non - Cellular IoT Chips Product Portfolios and Specifications

13.15.3 Qorvo Non - Cellular IoT Chips Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 Qorvo Main Business Overview

13.15.5 Qorvo Latest Developments

13.16 UNISOC

13.16.1 UNISOC Company Information

13.16.2 UNISOC Non - Cellular IoT Chips Product Portfolios and Specifications

13.16.3 UNISOC Non - Cellular IoT Chips Sales, Revenue, Price and Gross Margin (2021-2026)

13.16.4 UNISOC Main Business Overview

13.16.5 UNISOC Latest Developments

13.17 Telink Semiconductor (shanghai)co.,ltd.

13.17.1 Telink Semiconductor (shanghai)co.,ltd. Company Information

13.17.2 Telink Semiconductor (shanghai)co.,ltd. Non - Cellular IoT Chips Product

Portfolios and Specifications

13.17.3 Telink Semiconductor (shanghai)co.,ltd. Non - Cellular IoT Chips Sales, Revenue, Price and Gross Margin (2021-2026)

13.17.4 Telink Semiconductor (shanghai)co.,ltd. Main Business Overview

13.17.5 Telink Semiconductor (shanghai)co.,ltd. Latest Developments

13.18 Shenzhen HiSilicon Technologies

13.18.1 Shenzhen HiSilicon Technologies Company Information

13.18.2 Shenzhen HiSilicon Technologies Non - Cellular IoT Chips Product Portfolios and Specifications

13.18.3 Shenzhen HiSilicon Technologies Non - Cellular IoT Chips Sales, Revenue, Price and Gross Margin (2021-2026)

13.18.4 Shenzhen HiSilicon Technologies Main Business Overview

13.18.5 Shenzhen HiSilicon Technologies Latest Developments

13.19 ASR Microelectronics Co., Ltd.

13.19.1 ASR Microelectronics Co., Ltd. Company Information

13.19.2 ASR Microelectronics Co., Ltd. Non - Cellular IoT Chips Product Portfolios and Specifications

13.19.3 ASR Microelectronics Co., Ltd. Non - Cellular IoT Chips Sales, Revenue, Price and Gross Margin (2021-2026)

13.19.4 ASR Microelectronics Co., Ltd. Main Business Overview

13.19.5 ASR Microelectronics Co., Ltd. Latest Developments

13.20 Zhuhai All Winner Technology

13.20.1 Zhuhai All Winner Technology Company Information

13.20.2 Zhuhai All Winner Technology Non - Cellular IoT Chips Product Portfolios and Specifications

13.20.3 Zhuhai All Winner Technology Non - Cellular IoT Chips Sales, Revenue, Price and Gross Margin (2021-2026)

13.20.4 Zhuhai All Winner Technology Main Business Overview

13.20.5 Zhuhai All Winner Technology Latest Developments

13.21 Espressif Systems

13.21.1 Espressif Systems Company Information

13.21.2 Espressif Systems Non - Cellular IoT Chips Product Portfolios and Specifications

13.21.3 Espressif Systems Non - Cellular IoT Chips Sales, Revenue, Price and Gross Margin (2021-2026)

13.21.4 Espressif Systems Main Business Overview

13.21.5 Espressif Systems Latest Developments

13.22 Beken Corporation

13.22.1 Beken Corporation Company Information

13.22.2 Beken Corporation Non - Cellular IoT Chips Product Portfolios and Specifications

13.22.3 Beken Corporation Non - Cellular IoT Chips Sales, Revenue, Price and Gross Margin (2021-2026)

13.22.4 Beken Corporation Main Business Overview

13.22.5 Beken Corporation Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Non-Cellular IoT Chips Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Non-Cellular IoT Chips Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of BLE

Table 4. Major Players of Wi-Fi IoT

Table 5. Major Players of Zigbee/Thread/Matter

Table 6. Major Players of Others

Table 7. Global Non-Cellular IoT Chips Sales by Type (2021-2026) & (Million Units)

Table 8. Global Non-Cellular IoT Chips Sales Market Share by Type (2021-2026)

Table 9. Global Non-Cellular IoT Chips Revenue by Type (2021-2026) & (\$ million)

Table 10. Global Non-Cellular IoT Chips Revenue Market Share by Type (2021-2026)

Table 11. Global Non-Cellular IoT Chips Sale Price by Type (2021-2026) & (US\$/Unit)

Table 12. Major Players of Single-mode

Table 13. Major Players of Multi-mode

Table 14. Global Non-Cellular IoT Chips Sales by Integration (2021-2026) & (Million Units)

Table 15. Global Non-Cellular IoT Chips Sales Market Share by Integration (2021-2026)

Table 16. Global Non-Cellular IoT Chips Revenue by Integration (2021-2026) & (\$ million)

Table 17. Global Non-Cellular IoT Chips Revenue Market Share by Integration (2021-2026)

Table 18. Global Non-Cellular IoT Chips Sale Price by Integration (2021-2026) & (US\$/Unit)

Table 19. Major Players of Short Range

Table 20. Major Players of Long Range

Table 21. Global Non-Cellular IoT Chips Sales by Technology (2021-2026) & (Million Units)

Table 22. Global Non-Cellular IoT Chips Sales Market Share by Technology (2021-2026)

Table 23. Global Non-Cellular IoT Chips Revenue by Technology (2021-2026) & (\$ million)

Table 24. Global Non-Cellular-IoT-Chips Revenue Market Share by Technology (2021-2026)

Table 25. Global Non-Cellular-IoT-Chips Sale Price by Technology (2021-2026) & (US\$/Unit)

Table 26. Global Non-Cellular-IoT-Chips Sale by Application (2021-2026) & (Million Units)

Table 27. Global Non-Cellular-IoT-Chips Sale Market Share by Application (2021-2026)

Table 28. Global Non-Cellular-IoT-Chips Revenue by Application (2021-2026) & (\$ million)

Table 29. Global Non-Cellular-IoT-Chips Revenue Market Share by Application (2021-2026)

Table 30. Global Non-Cellular-IoT-Chips Sale Price by Application (2021-2026) & (US\$/Unit)

Table 31. Global Non-Cellular-IoT-Chips Sales by Company (2021-2026) & (Million Units)

Table 32. Global Non-Cellular-IoT-Chips Sales Market Share by Company (2021-2026)

Table 33. Global Non-Cellular-IoT-Chips Revenue by Company (2021-2026) & (\$ millions)

Table 34. Global Non-Cellular-IoT-Chips Revenue Market Share by Company (2021-2026)

Table 35. Global Non-Cellular-IoT-Chips Sale Price by Company (2021-2026) & (US\$/Unit)

Table 36. Key Manufacturers Non-Cellular-IoT-Chips Producing Area Distribution and Sales Area

Table 37. Players Non-Cellular-IoT-Chips Products Offered

Table 38. Non-Cellular-IoT-Chips Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 39. New Products and Potential Entrants

Table 40. Market M&A Activity & Strategy

Table 41. Global Non-Cellular-IoT-Chips Sales by Geographic Region (2021-2026) & (Million Units)

Table 42. Global Non-Cellular-IoT-Chips Sales Market Share Geographic Region (2021-2026)

Table 43. Global Non-Cellular-IoT-Chips Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 44. Global Non-Cellular-IoT-Chips Revenue Market Share by Geographic Region (2021-2026)

Table 45. Global Non-Cellular IoT Chips Sales by Country/Region (2021-2026) & (Million Units)

Table 46. Global Non-Cellular IoT Chips Sales Market Share by Country/Region (2021-2026)

Table 47. Global Non-Cellular IoT Chips Revenue by Country/Region (2021-2026) & (\$ millions)

Table 48. Global Non-Cellular IoT Chips Revenue Market Share by Country/Region (2021-2026)

Table 49. Americas Non-Cellular IoT Chips Sales by Country (2021-2026) & (Million Units)

Table 50. Americas Non-Cellular IoT Chips Sales Market Share by Country (2021-2026)

Table 51. Americas Non-Cellular IoT Chips Revenue by Country (2021-2026) & (\$ millions)

Table 52. Americas Non-Cellular IoT Chips Sales by Type (2021-2026) & (Million Units)

Table 53. Americas Non-Cellular IoT Chips Sales by Application (2021-2026) & (Million Units)

Table 54. APAC Non-Cellular IoT Chips Sales by Region (2021-2026) & (Million Units)

Table 55. APAC Non-Cellular IoT Chips Sales Market Share by Region (2021-2026)

Table 56. APAC Non-Cellular IoT Chips Revenue by Region (2021-2026) & (\$ millions)

Table 57. APAC Non-Cellular IoT Chips Sales by Type (2021-2026) & (Million Units)

Table 58. APAC Non-Cellular IoT Chips Sales by Application (2021-2026) & (Million Units)

Table 59. Europe Non-Cellular IoT Chips Sales by Country (2021-2026) & (Million Units)

Table 60. Europe Non-Cellular IoT Chips Revenue by Country (2021-2026) & (\$ millions)

Table 61. Europe Non-Cellular IoT Chips Sales by Type (2021-2026) & (Million Units)

Table 62. Europe Non-Cellular IoT Chips Sales by Application (2021-2026) & (Million Units)

Table 63. Middle East & Africa Non-Cellular IoT Chips Sales by Country (2021-2026) & (Million Units)

Table 64. Middle East & Africa Non-Cellular IoT Chips Revenue Market Share by Country (2021-2026)

Table 65. Middle East & Africa Non-Cellular IoT Chips Sales by Type (2021-2026) &

(Million Units)

Table 66. Middle East & Africa Non-Cellular IoT Chips Sales by Application (2021-2026) & (Million Units)

Table 67. Key Market Drivers & Growth Opportunities of Non-Cellular IoT Chips

Table 68. Key Market Challenges & Risks of Non-Cellular IoT Chips

Table 69. Key Industry Trends of Non-Cellular IoT Chips

Table 70. Non-Cellular IoT Chips Raw Material

Table 71. Key Suppliers of Raw Materials

Table 72. Non-Cellular IoT Chips Distributors List

Table 73. Non-Cellular IoT Chips Customer List

Table 74. Global Non-Cellular IoT Chips Sales Forecast by Region (2027-2032) & (Million Units)

Table 75. Global Non-Cellular IoT Chips Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 76. Americas Non-Cellular IoT Chips Sales Forecast by Country (2027-2032) & (Million Units)

Table 77. Americas Non-Cellular IoT Chips Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 78. APAC Non-Cellular IoT Chips Sales Forecast by Region (2027-2032) & (Million Units)

Table 79. APAC Non-Cellular IoT Chips Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 80. Europe Non-Cellular IoT Chips Sales Forecast by Country (2027-2032) & (Million Units)

Table 81. Europe Non-Cellular IoT Chips Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 82. Middle East & Africa Non-Cellular IoT Chips Sales Forecast by Country (2027-2032) & (Million Units)

Table 83. Middle East & Africa Non-Cellular IoT Chips Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 84. Global Non-Cellular IoT Chips Sales Forecast by Type (2027-2032) & (Million Units)

Table 85. Global Non-Cellular IoT Chips Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 86. Global Non-Cellular IoT Chips Sales Forecast by Application (2027-2032) & (Million Units)

Table 87. Global Non-Cellular IoT Chips Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 88. Broadcomm Basic Information, Non-Cellular IoT Chips Manufacturing

Base, Sales Area and Its Competitors

Table 89. Broadcom Non?/?Cellular?IoT?Chips Product Portfolios and Specifications

Table 90. Broadcom Non?/?Cellular?IoT?Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 91. Broadcom Main Business

Table 92. Broadcom Latest Developments

Table 93. Qualcomm Basic Information, Non?/?Cellular?IoT?Chips Manufacturing Base, Sales Area and Its Competitors

Table 94. Qualcomm Non?/?Cellular?IoT?Chips Product Portfolios and Specifications

Table 95. Qualcomm Non?/?Cellular?IoT?Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 96. Qualcomm Main Business

Table 97. Qualcomm Latest Developments

Table 98. Texas Instruments Basic Information, Non?/?Cellular?IoT?Chips Manufacturing Base, Sales Area and Its Competitors

Table 99. Texas Instruments Non?/?Cellular?IoT?Chips Product Portfolios and Specifications

Table 100. Texas Instruments Non?/?Cellular?IoT?Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 101. Texas Instruments Main Business

Table 102. Texas Instruments Latest Developments

Table 103. Nordic Semiconductor Basic Information, Non?/?Cellular?IoT?Chips Manufacturing Base, Sales Area and Its Competitors

Table 104. Nordic Semiconductor Non?/?Cellular?IoT?Chips Product Portfolios and Specifications

Table 105. Nordic Semiconductor Non?/?Cellular?IoT?Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 106. Nordic Semiconductor Main Business

Table 107. Nordic Semiconductor Latest Developments

Table 108. Renesas Electronics (Dialog Semiconductor) Basic Information, Non?/?Cellular?IoT?Chips Manufacturing Base, Sales Area and Its Competitors

Table 109. Renesas Electronics (Dialog Semiconductor) Non?/?Cellular?IoT?Chips Product Portfolios and Specifications

Table 110. Renesas Electronics (Dialog Semiconductor) Non?/?Cellular?IoT?Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 111. Renesas Electronics (Dialog Semiconductor) Main Business

Table 112. Renesas Electronics (Dialog Semiconductor) Latest Developments

Table 113. Silicon Labs Basic Information, Non?/?Cellular?IoT?Chips Manufacturing

Base, Sales Area and Its Competitors

Table 114. Silicon Labs Non?/?Cellular?IoT?Chips Product Portfolios and Specifications

Table 115. Silicon Labs Non?/?Cellular?IoT?Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 116. Silicon Labs Main Business

Table 117. Silicon Labs Latest Developments

Table 118. NXP Semiconductors Basic Information, Non?/?Cellular?IoT?Chips Manufacturing Base, Sales Area and Its Competitors

Table 119. NXP Semiconductors Non?/?Cellular?IoT?Chips Product Portfolios and Specifications

Table 120. NXP Semiconductors Non?/?Cellular?IoT?Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 121. NXP Semiconductors Main Business

Table 122. NXP Semiconductors Latest Developments

Table 123. STMicroelectronics Basic Information, Non?/?Cellular?IoT?Chips Manufacturing Base, Sales Area and Its Competitors

Table 124. STMicroelectronics Non?/?Cellular?IoT?Chips Product Portfolios and Specifications

Table 125. STMicroelectronics Non?/?Cellular?IoT?Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 126. STMicroelectronics Main Business

Table 127. STMicroelectronics Latest Developments

Table 128. Realtek Semiconductor Corporation Basic Information, Non?/?Cellular?IoT?Chips Manufacturing Base, Sales Area and Its Competitors

Table 129. Realtek Semiconductor Corporation Non?/?Cellular?IoT?Chips Product Portfolios and Specifications

Table 130. Realtek Semiconductor Corporation Non?/?Cellular?IoT?Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 131. Realtek Semiconductor Corporation Main Business

Table 132. Realtek Semiconductor Corporation Latest Developments

Table 133. Infineon Basic Information, Non?/?Cellular?IoT?Chips Manufacturing Base, Sales Area and Its Competitors

Table 134. Infineon Non?/?Cellular?IoT?Chips Product Portfolios and Specifications

Table 135. Infineon Non?/?Cellular?IoT?Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 136. Infineon Main Business

Table 137. Infineon Latest Developments

Table 138. Microchip Technology Basic Information, Non?/?Cellular?IoT?Chips

Manufacturing Base, Sales Area and Its Competitors

Table 139. Microchip Technology Non?/?Cellular?IoT?Chips Product Portfolios and Specifications

Table 140. Microchip Technology Non?/?Cellular?IoT?Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 141. Microchip Technology Main Business

Table 142. Microchip Technology Latest Developments

Table 143. Toshiba Basic Information, Non?/?Cellular?IoT?Chips Manufacturing Base, Sales Area and Its Competitors

Table 144. Toshiba Non?/?Cellular?IoT?Chips Product Portfolios and Specifications

Table 145. Toshiba Non?/?Cellular?IoT?Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 146. Toshiba Main Business

Table 147. Toshiba Latest Developments

Table 148. Onsemi Basic Information, Non?/?Cellular?IoT?Chips Manufacturing Base, Sales Area and Its Competitors

Table 149. Onsemi Non?/?Cellular?IoT?Chips Product Portfolios and Specifications

Table 150. Onsemi Non?/?Cellular?IoT?Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 151. Onsemi Main Business

Table 152. Onsemi Latest Developments

Table 153. MediaTek Basic Information, Non?/?Cellular?IoT?Chips Manufacturing Base, Sales Area and Its Competitors

Table 154. MediaTek Non?/?Cellular?IoT?Chips Product Portfolios and Specifications

Table 155. MediaTek Non?/?Cellular?IoT?Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 156. MediaTek Main Business

Table 157. MediaTek Latest Developments

Table 158. Qorvo Basic Information, Non?/?Cellular?IoT?Chips Manufacturing Base, Sales Area and Its Competitors

Table 159. Qorvo Non?/?Cellular?IoT?Chips Product Portfolios and Specifications

Table 160. Qorvo Non?/?Cellular?IoT?Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 161. Qorvo Main Business

Table 162. Qorvo Latest Developments

Table 163. UNISOC Basic Information, Non?/?Cellular?IoT?Chips Manufacturing Base, Sales Area and Its Competitors

Table 164. UNISOC Non?/?Cellular?IoT?Chips Product Portfolios and Specifications

Table 165. UNISOC Non?/?Cellular?IoT?Chips Sales (Million Units), Revenue (\$

Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 166. UNISOC Main Business

Table 167. UNISOC Latest Developments

Table 168. Telink Semiconductor (shanghai)co.,ltd. Basic Information,
Non?~?Cellular?IoT?Chips Manufacturing Base, Sales Area and Its Competitors

Table 169. Telink Semiconductor (shanghai)co.,ltd. Non?~?Cellular?IoT?Chips Product
Portfolios and Specifications

Table 170. Telink Semiconductor (shanghai)co.,ltd. Non?~?Cellular?IoT?Chips Sales
(Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 171. Telink Semiconductor (shanghai)co.,ltd. Main Business

Table 172. Telink Semiconductor (shanghai)co.,ltd. Latest Developments

Table 173. Shenzhen HiSilicon Technologies Basic Information,
Non?~?Cellular?IoT?Chips Manufacturing Base, Sales Area and Its Competitors

Table 174. Shenzhen HiSilicon Technologies Non?~?Cellular?IoT?Chips Product
Portfolios and Specifications

Table 175. Shenzhen HiSilicon Technologies Non?~?Cellular?IoT?Chips Sales (Million
Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 176. Shenzhen HiSilicon Technologies Main Business

Table 177. Shenzhen HiSilicon Technologies Latest Developments

Table 178. ASR Microelectronics Co., Ltd. Basic Information, Non?~?Cellular?IoT?Chips
Manufacturing Base, Sales Area and Its Competitors

Table 179. ASR Microelectronics Co., Ltd. Non?~?Cellular?IoT?Chips Product Portfolios
and Specifications

Table 180. ASR Microelectronics Co., Ltd. Non?~?Cellular?IoT?Chips Sales (Million
Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 181. ASR Microelectronics Co., Ltd. Main Business

Table 182. ASR Microelectronics Co., Ltd. Latest Developments

Table 183. Zhuhai All Winner Technology Basic Information, Non?~?Cellular?IoT?Chips
Manufacturing Base, Sales Area and Its Competitors

Table 184. Zhuhai All Winner Technology Non?~?Cellular?IoT?Chips Product Portfolios
and Specifications

Table 185. Zhuhai All Winner Technology Non?~?Cellular?IoT?Chips Sales (Million
Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 186. Zhuhai All Winner Technology Main Business

Table 187. Zhuhai All Winner Technology Latest Developments

Table 188. Espressif Systems Basic Information, Non?~?Cellular?IoT?Chips
Manufacturing Base, Sales Area and Its Competitors

Table 189. Espressif Systems Non?~?Cellular?IoT?Chips Product Portfolios and
Specifications

Table 190. Espressif Systems Non-Cellular IoT Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 191. Espressif Systems Main Business

Table 192. Espressif Systems Latest Developments

Table 193. Beken Corporation Basic Information, Non-Cellular IoT Chips Manufacturing Base, Sales Area and Its Competitors

Table 194. Beken Corporation Non-Cellular IoT Chips Product Portfolios and Specifications

Table 195. Beken Corporation Non-Cellular IoT Chips Sales (Million Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 196. Beken Corporation Main Business

Table 197. Beken Corporation Latest Developments

List Of Figures

LIST OF FIGURES

Figure 1. Picture of Non-Cellular IoT Chips

Figure 2. Non-Cellular IoT Chips Report Years Considered

Figure 3. Research Objectives

Figure 4. Research Methodology

Figure 5. Research Process and Data Source

Figure 6. Global Non-Cellular IoT Chips Sales Growth Rate 2021-2032 (Million Units)

Figure 7. Global Non-Cellular IoT Chips Revenue Growth Rate 2021-2032 (\$ millions)

Figure 8. Non-Cellular IoT Chips Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Figure 9. Non-Cellular IoT Chips Sales Market Share by Country/Region (2025)

Figure 10. Non-Cellular IoT Chips Sales Market Share by Country/Region (2021, 2025 & 2032)

Figure 11. Product Picture of BLE

Figure 12. Product Picture of Wi-Fi IoT

Figure 13. Product Picture of Zigbee/Thread/Matter

Figure 14. Product Picture of Others

Figure 15. Global Non-Cellular IoT Chips Sales Market Share by Type in 2026

Figure 16. Global Non-Cellular IoT Chips Revenue Market Share by Type (2021-2026)

Figure 17. Product Picture of Single-mode

Figure 18. Product Picture of Multi-mode

Figure 19. Global Non-Cellular IoT Chips Sales Market Share by Integration in 2026

Figure 20. Global Non-Cellular IoT Chips Revenue Market Share by Integration (2021-2026)

Figure 21. Product Picture of Short Range

Figure 22. Product Picture of Long Range

Figure 23. Global Non-Cellular IoT Chips Sales Market Share by Technology in 2026

Figure 24. Global Non-Cellular IoT Chips Revenue Market Share by Technology (2021-2026)

Figure 25. Non-Cellular IoT Chips Consumed in Smart Home

Figure 26. Global Non-Cellular IoT Chips Market: Smart Home (2021-2026) & (Million Units)

Figure 27. Non-Cellular IoT Chips Consumed in Smart Healthcare

Figure 28. Global Non-Cellular IoT Chips Market: Smart Healthcare (2021-2026) & (Million Units)

Figure 29. Non-Cellular IoT Chips Consumed in Retail Logistics

Figure 30. Global Non-Cellular IoT Chips Market: Retail Logistics (2021-2026) & (Million Units)

Figure 31. Non-Cellular IoT Chips Consumed in Consumer Electronics

Figure 32. Global Non-Cellular IoT Chips Market: Consumer Electronics (2021-2026) & (Million Units)

Figure 33. Non-Cellular IoT Chips Consumed in Automotive Electronics

Figure 34. Global Non-Cellular IoT Chips Market: Automotive Electronics (2021-2026) & (Million Units)

Figure 35. Non-Cellular IoT Chips Consumed in Other

Figure 36. Global Non-Cellular IoT Chips Market: Other (2021-2026) & (Million Units)

Figure 37. Global Non-Cellular IoT Chips Sale Market Share by Application (2025)

Figure 38. Global Non-Cellular IoT Chips Revenue Market Share by Application in 2026

Figure 39. Non-Cellular IoT Chips Sales by Company in 2026 (Million Units)

Figure 40. Global Non-Cellular IoT Chips Sales Market Share by Company in 2026

Figure 41. Non-Cellular IoT Chips Revenue by Company in 2026 (\$ millions)

Figure 42. Global Non-Cellular IoT Chips Revenue Market Share by Company in 2026

Figure 43. Global Non-Cellular IoT Chips Sales Market Share by Geographic Region (2021-2026)

Figure 44. Global Non-Cellular IoT Chips Revenue Market Share by Geographic Region in 2026

Figure 45. Americas Non-Cellular IoT Chips Sales 2021-2026 (Million Units)

Figure 46. Americas Non-Cellular IoT Chips Revenue 2021-2026 (\$ millions)

Figure 47. APAC Non-Cellular IoT Chips Sales 2021-2026 (Million Units)

Figure 48. APAC Non-Cellular IoT Chips Revenue 2021-2026 (\$ millions)

Figure 49. Europe Non-Cellular IoT Chips Sales 2021-2026 (Million Units)

Figure 50. Europe Non-Cellular IoT Chips Revenue 2021-2026 (\$ millions)

Figure 51. Middle East & Africa Non-Cellular IoT Chips Sales 2021-2026 (Million Units)

Figure 52. Middle East & Africa Non-Cellular IoT Chips Revenue 2021-2026 (\$ millions)

Figure 53. Americas Non-Cellular IoT Chips Sales Market Share by Country in 2026

Figure 54. Americas Non-Cellular IoT Chips Revenue Market Share by Country

(2021-2026)

Figure 55. Americas Non-CellularIoTChips Sales Market Share by Type

(2021-2026)

Figure 56. Americas Non-CellularIoTChips Sales Market Share by Application

(2021-2026)

Figure 57. United States Non-CellularIoTChips Revenue Growth 2021-2026 (\$ millions)

Figure 58. Canada Non-CellularIoTChips Revenue Growth 2021-2026 (\$ millions)

Figure 59. Mexico Non-CellularIoTChips Revenue Growth 2021-2026 (\$ millions)

Figure 60. Brazil Non-CellularIoTChips Revenue Growth 2021-2026 (\$ millions)

Figure 61. APAC Non-CellularIoTChips Sales Market Share by Region in 2026

Figure 62. APAC Non-CellularIoTChips Revenue Market Share by Region
(2021-2026)

Figure 63. APAC Non-CellularIoTChips Sales Market Share by Type (2021-2026)

Figure 64. APAC Non-CellularIoTChips Sales Market Share by Application
(2021-2026)

Figure 65. China Non-CellularIoTChips Revenue Growth 2021-2026 (\$ millions)

Figure 66. Japan Non-CellularIoTChips Revenue Growth 2021-2026 (\$ millions)

Figure 67. South Korea Non-CellularIoTChips Revenue Growth 2021-2026 (\$ millions)

Figure 68. Southeast Asia Non-CellularIoTChips Revenue Growth 2021-2026 (\$ millions)

Figure 69. India Non-CellularIoTChips Revenue Growth 2021-2026 (\$ millions)

Figure 70. Australia Non-CellularIoTChips Revenue Growth 2021-2026 (\$ millions)

Figure 71. China Taiwan Non-CellularIoTChips Revenue Growth 2021-2026 (\$ millions)

Figure 72. Europe Non-CellularIoTChips Sales Market Share by Country in 2026

Figure 73. Europe Non-CellularIoTChips Revenue Market Share by Country
(2021-2026)

Figure 74. Europe Non-CellularIoTChips Sales Market Share by Type (2021-2026)

Figure 75. Europe Non-CellularIoTChips Sales Market Share by Application
(2021-2026)

Figure 76. Germany Non-CellularIoTChips Revenue Growth 2021-2026 (\$ millions)

Figure 77. France Non-CellularIoTChips Revenue Growth 2021-2026 (\$ millions)

Figure 78. UK Non-CellularIoTChips Revenue Growth 2021-2026 (\$ millions)

Figure 79. Italy Non-CellularIoTChips Revenue Growth 2021-2026 (\$ millions)

Figure 80. Russia Non-CellularIoTChips Revenue Growth 2021-2026 (\$ millions)

Figure 81. Middle East & Africa Non-CellularIoTChips Sales Market Share by
Country (2021-2026)

Figure 82. Middle East & Africa Non-Cellular IoT Chips Sales Market Share by Type (2021-2026)

Figure 83. Middle East & Africa Non-Cellular IoT Chips Sales Market Share by Application (2021-2026)

Figure 84. Egypt Non-Cellular IoT Chips Revenue Growth 2021-2026 (\$ millions)

Figure 85. South Africa Non-Cellular IoT Chips Revenue Growth 2021-2026 (\$ millions)

Figure 86. Israel Non-Cellular IoT Chips Revenue Growth 2021-2026 (\$ millions)

Figure 87. Turkey Non-Cellular IoT Chips Revenue Growth 2021-2026 (\$ millions)

Figure 88. GCC Countries Non-Cellular IoT Chips Revenue Growth 2021-2026 (\$ millions)

Figure 89. Manufacturing Cost Structure Analysis of Non-Cellular IoT Chips in 2026

Figure 90. Manufacturing Process Analysis of Non-Cellular IoT Chips

Figure 91. Industry Chain Structure of Non-Cellular IoT Chips

Figure 92. Channels of Distribution

Figure 93. Global Non-Cellular IoT Chips Sales Market Forecast by Region (2027-2032)

Figure 94. Global Non-Cellular IoT Chips Revenue Market Share Forecast by Region (2027-2032)

Figure 95. Global Non-Cellular IoT Chips Sales Market Share Forecast by Type (2027-2032)

Figure 96. Global Non-Cellular IoT Chips Revenue Market Share Forecast by Type (2027-2032)

Figure 97. Global Non-Cellular IoT Chips Sales Market Share Forecast by Application (2027-2032)

Figure 98. Global Non-Cellular IoT Chips Revenue Market Share Forecast by Application (2027-2032)

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