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Global V2X Communication Chip Market Growth 2026-2032

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Abstracts

The global V2X Communication Chip market size is predicted to grow from US$ 181 million in 2025 to US$ 684 million in 2032; it is expected to grow at a CAGR of 20.3% from 2026 to 2032.

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

Key Findings

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

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

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

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

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

Market Trends

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

Market Dynamics

Drivers

Growth is being driven by the need to improve road safety beyond the line-of-sight limitations of cameras and radar, as well as by government-led deployment of connected-road infrastructure. China’s vehicle-road-cloud integration program requires participating areas to expand C-V2X infrastructure, improve onboard-terminal installation and develop interoperable city-level systems during the 2024–2026 pilot

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period. The United States has also established a national V2X deployment plan and funded interoperable connected-vehicle projects. These initiatives are expanding the addressable demand for vehicle-side and roadside communication chips, while vehicle manufacturers are increasingly evaluating V2X as a complementary data source for driver assistance, cooperative perception and automated-driving functions. Continued standard development under 3GPP further supports investment in platforms that can evolve from LTE-V2X toward NR-V2X.

Restraints

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

Opportunities

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

Challenges

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

Industry Chain Analysis

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

The midstream segment converts these inputs into standalone modems, RF-baseband chipsets, dedicated V2X SoCs and integrated cellular-V2X processors. Downstream integration occurs through communication modules, telematics control units, onboard units, roadside units and vehicle connectivity platforms. A chipset provides the wireless modem and fundamental transmission functions, while a module adds supporting processors, positioning, security, interfaces and board-level components. Value creation is therefore concentrated in reliable physical-layer implementation, automotive certification, reference designs, protocol-stack compatibility and the ability to support customers throughout multiyear vehicle and infrastructure programs. Suppliers with reusable automotive platforms and established software ecosystems generally have stronger economics than vendors dependent on isolated project-based chip designs.

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Segment Insights

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

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

Downstream Market Opportunities

The largest downstream opportunity is the gradual adoption of V2X Communication Chip platforms in factory-installed vehicle connectivity systems, where the technology can complement camera, radar and lidar information with non-line-of-sight road intelligence. Roadside infrastructure offers an additional source of demand through connected intersections, signal controllers, highway corridors and safety-warning systems. Commercial fleets and controlled operating environments may commercialize more rapidly because vehicles and infrastructure can be deployed under a unified operating model. As connected-vehicle penetration increases, applications are expected to progress from basic warnings toward shared perception, coordinated lane changes, platooning and infrastructure-assisted automated driving. Opportunities will favor chip

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platforms that can support both vehicle-side and roadside products while maintaining consistent security, positioning and protocol performance.

Regional Insights

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

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

Competitive Landscape Analysis

The V2X Communication Chip market has a highly concentrated competitive structure, with seven validated parent-level suppliers in the formal core list. Competition is based less on headline processor performance than on standards implementation, automotive qualification, radio reliability, security, software compatibility and multiyear program support. Qualcomm has strengthened its position by integrating Autotalks, expanding its ability to address cellular V2X and established direct-communication technologies under a broader automotive platform. NXP and Renesas possess verified IEEE 802.11p and DSRC product experience, although Renesas is more closely associated with an earlier product generation. Huawei, ZTE and China Information and Communication Technologies Group participate through communications-chip and C-V2X SoC capabilities, while UNISOC is positioned through an integrated 5G, V2X and IoT NTN automotive platform with more limited public detail on its V2X implementation. The competitive direction favors larger platform suppliers and specialized vendors with validated automotive products; however, regional supply-chain strategies may preserve

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opportunities for domestic chip developers that can secure vehicle qualification, module ecosystems and repeatable commercial deployments.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “V2X Communication Chip Industry Forecast” looks at past sales and reviews total world V2X Communication Chip sales in 2025, providing a comprehensive analysis by region and market sector of projected V2X Communication Chip sales for 2026 through 2032. With V2X Communication Chip sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world V2X Communication Chip industry.

This Insight Report provides a comprehensive analysis of the global V2X Communication 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 V2X Communication Chip portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global V2X Communication Chip market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for V2X Communication Chip 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 V2X Communication Chip.

This report presents a comprehensive overview, market shares, and growth opportunities of V2X Communication Chip market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

V2X Baseband Chip

V2X Modem Chip

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V2X RF Transceiver

V2X System-on-Chip

V2X Chipset

Other

Segmentation by Communication Standard:

IEEE 802.11p / DSRC

ITS-G5

LTE-V2X

NR-V2X

Multi-standard V2X

Other

Segmentation by Integration Level:

Discrete V2X Chip

Semi-integrated V2X Chip

Integrated V2X SoC

Integrated Cellular and V2X SoC

Other

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Segmentation by Connectivity Architecture:

Direct Sidelink Only

Sidelink and Cellular Dual-connectivity

Hybrid Multi-radio Connectivity

Other

Segmentation by Application:

Basic Safety Applications

Cooperative Perception

Cooperative Driving

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

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- 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.

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Huawei Technologies Co., Ltd.

Qualcomm Incorporated

ZTE Corporation

NXP Semiconductors N.V.

Renesas Electronics Corporation

China Information and Communication Technologies Group Corporation

UNISOC (Shanghai) Technologies Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global V2X Communication Chip market?

What factors are driving V2X Communication Chip market growth, globally and by region?

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

How do V2X Communication Chip market opportunities vary by end market size?

How does V2X Communication 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 V2X Communication Chip Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for V2X Communication Chip by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for V2X Communication Chip by Country/Region, 2021, 2025 & 2032
2.2 V2X Communication Chip Segment by Type
  2.2.1 V2X Baseband Chip
  2.2.2 V2X Modem Chip
  2.2.3 V2X RF Transceiver
  2.2.4 V2X System-on-Chip
  2.2.5 V2X Chipset
  2.2.6 Other
  2.2.7 V2X Communication Chip Sales by Type
    2.2.7.1 Global V2X Communication Chip Sales Market Share by Type (2021-2026)
    2.2.7.2 Global V2X Communication Chip Revenue and Market Share by Type (2021-2026)
    2.2.7.3 Global V2X Communication Chip Sale Price by Type (2021-2026)
2.3 V2X Communication Chip Segment by Communication Standard
  2.3.1 IEEE 802.11p / DSRC
  2.3.2 ITS-G5
  2.3.3 LTE-V2X
  2.3.4 NR-V2X
  2.3.5 Multi-standard V2X

+357 96 030922
info@marketpublishers.com

2.3.6 Other
2.3.7 V2X Communication Chip Sales by Communication Standard
2.3.7.1 Global V2X Communication Chip Sales Market Share by Communication Standard (2021-2026)
2.3.7.2 Global V2X Communication Chip Revenue and Market Share by Communication Standard (2021-2026)
2.3.7.3 Global V2X Communication Chip Sale Price by Communication Standard (2021-2026)
2.4 V2X Communication Chip Segment by Integration Level
2.4.1 Discrete V2X Chip
2.4.2 Semi-integrated V2X Chip
2.4.3 Integrated V2X SoC
2.4.4 Integrated Cellular and V2X SoC
2.4.5 Other
2.4.6 V2X Communication Chip Sales by Integration Level
2.4.6.1 Global V2X Communication Chip Sales Market Share by Integration Level (2021-2026)
2.4.6.2 Global V2X Communication Chip Revenue and Market Share by Integration Level (2021-2026)
2.4.6.3 Global V2X Communication Chip Sale Price by Integration Level (2021-2026)
2.5 V2X Communication Chip Segment by Connectivity Architecture
2.5.1 Direct Sidelink Only
2.5.2 Sidelink and Cellular Dual-connectivity
2.5.3 Hybrid Multi-radio Connectivity
2.5.4 Other
2.5.5 V2X Communication Chip Sales by Connectivity Architecture
2.5.5.1 Global V2X Communication Chip Sales Market Share by Connectivity Architecture (2021-2026)
2.5.5.2 Global V2X Communication Chip Revenue and Market Share by Connectivity Architecture (2021-2026)
2.5.5.3 Global V2X Communication Chip Sale Price by Connectivity Architecture (2021-2026)
2.6 V2X Communication Chip Segment by Application
2.6.1 Basic Safety Applications
2.6.2 Cooperative Perception
2.6.3 Cooperative Driving
2.6.4 Other
2.6.5 V2X Communication Chip Sales by Application
2.6.5.1 Global V2X Communication Chip Sale Market Share by Application

+357 96 030922
info@marketpublishers.com

(2021-2026)
2.6.5.2 Global V2X Communication Chip Revenue and Market Share by Application (2021-2026)
2.6.5.3 Global V2X Communication Chip Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global V2X Communication Chip Breakdown Data by Company
3.1.1 Global V2X Communication Chip Annual Sales by Company (2021-2026)
3.1.2 Global V2X Communication Chip Sales Market Share by Company (2021-2026)
3.2 Global V2X Communication Chip Annual Revenue by Company (2021-2026)
3.2.1 Global V2X Communication Chip Revenue by Company (2021-2026)
3.2.2 Global V2X Communication Chip Revenue Market Share by Company (2021-2026)
3.3 Global V2X Communication Chip Sale Price by Company
3.4 Key Manufacturers V2X Communication Chip Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers V2X Communication Chip Product Location Distribution
3.4.2 Players V2X Communication 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 V2X COMMUNICATION CHIP BY GEOGRAPHIC REGION

4.1 World Historic V2X Communication Chip Market Size by Geographic Region (2021-2026)
4.1.1 Global V2X Communication Chip Annual Sales by Geographic Region (2021-2026)
4.1.2 Global V2X Communication Chip Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic V2X Communication Chip Market Size by Country/Region (2021-2026)
4.2.1 Global V2X Communication Chip Annual Sales by Country/Region (2021-2026)
4.2.2 Global V2X Communication Chip Annual Revenue by Country/Region (2021-2026)

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4.3 Americas V2X Communication Chip Sales Growth
4.4 APAC V2X Communication Chip Sales Growth
4.5 Europe V2X Communication Chip Sales Growth
4.6 Middle East & Africa V2X Communication Chip Sales Growth

5 AMERICAS

5.1 Americas V2X Communication Chip Sales by Country
  5.1.1 Americas V2X Communication Chip Sales by Country (2021-2026)
  5.1.2 Americas V2X Communication Chip Revenue by Country (2021-2026)
5.2 Americas V2X Communication Chip Sales by Type (2021-2026)
5.3 Americas V2X Communication Chip Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC V2X Communication Chip Sales by Region
  6.1.1 APAC V2X Communication Chip Sales by Region (2021-2026)
  6.1.2 APAC V2X Communication Chip Revenue by Region (2021-2026)
6.2 APAC V2X Communication Chip Sales by Type (2021-2026)
6.3 APAC V2X Communication 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 V2X Communication Chip by Country
  7.1.1 Europe V2X Communication Chip Sales by Country (2021-2026)
  7.1.2 Europe V2X Communication Chip Revenue by Country (2021-2026)
7.2 Europe V2X Communication Chip Sales by Type (2021-2026)
7.3 Europe V2X Communication Chip Sales by Application (2021-2026)

+357 96 030922
info@marketpublishers.com

7.4 Germany
7.5 France
7.6 UK
7.7 Italy
7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa V2X Communication Chip by Country
  8.1.1 Middle East & Africa V2X Communication Chip Sales by Country (2021-2026)
  8.1.2 Middle East & Africa V2X Communication Chip Revenue by Country (2021-2026)
8.2 Middle East & Africa V2X Communication Chip Sales by Type (2021-2026)
8.3 Middle East & Africa V2X Communication 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 V2X Communication Chip
10.3 Manufacturing Process Analysis of V2X Communication Chip
10.4 Industry Chain Structure of V2X Communication Chip

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
  11.1.1 Direct Channels
  11.1.2 Indirect Channels
11.2 V2X Communication Chip Distributors
11.3 V2X Communication Chip Customer

+357 96 030922
info@marketpublishers.com

12 WORLD FORECAST REVIEW FOR V2X COMMUNICATION CHIP BY GEOGRAPHIC REGION

12.1 Global V2X Communication Chip Market Size Forecast by Region
12.1.1 Global V2X Communication Chip Forecast by Region (2027-2032)
12.1.2 Global V2X Communication Chip 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 V2X Communication Chip Forecast by Type (2027-2032)
12.7 Global V2X Communication 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. V2X Communication Chip Product Portfolios and Specifications
13.1.3 Huawei Technologies Co., Ltd. V2X Communication 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 V2X Communication Chip Product Portfolios and Specifications
13.2.3 Qualcomm Incorporated V2X Communication 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 ZTE Corporation
13.3.1 ZTE Corporation Company Information
13.3.2 ZTE Corporation V2X Communication Chip Product Portfolios and Specifications
13.3.3 ZTE Corporation V2X Communication Chip Sales, Revenue, Price and Gross Margin (2021-2026)

+357 96 030922
info@marketpublishers.com

13.3.4 ZTE Corporation Main Business Overview
13.3.5 ZTE Corporation Latest Developments
13.4 NXP Semiconductors N.V.
13.4.1 NXP Semiconductors N.V. Company Information
13.4.2 NXP Semiconductors N.V. V2X Communication Chip Product Portfolios and Specifications
13.4.3 NXP Semiconductors N.V. V2X Communication Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 NXP Semiconductors N.V. Main Business Overview
13.4.5 NXP Semiconductors N.V. Latest Developments
13.5 Renesas Electronics Corporation
13.5.1 Renesas Electronics Corporation Company Information
13.5.2 Renesas Electronics Corporation V2X Communication Chip Product Portfolios and Specifications
13.5.3 Renesas Electronics Corporation V2X Communication Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 Renesas Electronics Corporation Main Business Overview
13.5.5 Renesas Electronics Corporation Latest Developments
13.6 China Information and Communication Technologies Group Corporation
13.6.1 China Information and Communication Technologies Group Corporation Company Information
13.6.2 China Information and Communication Technologies Group Corporation V2X Communication Chip Product Portfolios and Specifications
13.6.3 China Information and Communication Technologies Group Corporation V2X Communication Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 China Information and Communication Technologies Group Corporation Main Business Overview
13.6.5 China Information and Communication Technologies Group 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. V2X Communication Chip Product Portfolios and Specifications
13.7.3 UNISOC (Shanghai) Technologies Co., Ltd. V2X Communication 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

14 RESEARCH FINDINGS AND CONCLUSION

+357 96 030922
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List Of Tables

LIST OF TABLES

Table 1. V2X Communication Chip Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. V2X Communication Chip Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of V2X Baseband Chip
Table 4. Major Players of V2X Modem Chip
Table 5. Major Players of V2X RF Transceiver
Table 6. Major Players of V2X System-on-Chip
Table 7. Major Players of V2X Chipset
Table 8. Major Players of Other
Table 9. Global V2X Communication Chip Sales by Type (2021-2026) & (Million Units)
Table 10. Global V2X Communication Chip Sales Market Share by Type (2021-2026)
Table 11. Global V2X Communication Chip Revenue by Type (2021-2026) & ($ million)
Table 12. Global V2X Communication Chip Revenue Market Share by Type (2021-2026)
Table 13. Global V2X Communication Chip Sale Price by Type (2021-2026) & (US$/Unit)
Table 14. Major Players of IEEE 802.11p / DSRC
Table 15. Major Players of ITS-G5
Table 16. Major Players of LTE-V2X
Table 17. Major Players of NR-V2X
Table 18. Major Players of Multi-standard V2X
Table 19. Major Players of Other
Table 20. Global V2X Communication Chip Sales by Communication Standard (2021-2026) & (Million Units)
Table 21. Global V2X Communication Chip Sales Market Share by Communication Standard (2021-2026)
Table 22. Global V2X Communication Chip Revenue by Communication Standard (2021-2026) & ($ million)
Table 23. Global V2X Communication Chip Revenue Market Share by Communication Standard (2021-2026)
Table 24. Global V2X Communication Chip Sale Price by Communication Standard (2021-2026) & (US$/Unit)
Table 25. Major Players of Discrete V2X Chip
Table 26. Major Players of Semi-integrated V2X Chip

+357 96 030922
info@marketpublishers.com

Table 27. Major Players of Integrated V2X SoC
Table 28. Major Players of Integrated Cellular and V2X SoC
Table 29. Major Players of Other
Table 30. Global V2X Communication Chip Sales by Integration Level (2021-2026) & (Million Units)
Table 31. Global V2X Communication Chip Sales Market Share by Integration Level (2021-2026)
Table 32. Global V2X Communication Chip Revenue by Integration Level (2021-2026) & ($ million)
Table 33. Global V2X Communication Chip Revenue Market Share by Integration Level (2021-2026)
Table 34. Global V2X Communication Chip Sale Price by Integration Level (2021-2026) & (US$/Unit)
Table 35. Major Players of Direct Sidelink Only
Table 36. Major Players of Sidelink and Cellular Dual-connectivity
Table 37. Major Players of Hybrid Multi-radio Connectivity
Table 38. Major Players of Other
Table 39. Global V2X Communication Chip Sales by Connectivity Architecture (2021-2026) & (Million Units)
Table 40. Global V2X Communication Chip Sales Market Share by Connectivity Architecture (2021-2026)
Table 41. Global V2X Communication Chip Revenue by Connectivity Architecture (2021-2026) & ($ million)
Table 42. Global V2X Communication Chip Revenue Market Share by Connectivity Architecture (2021-2026)
Table 43. Global V2X Communication Chip Sale Price by Connectivity Architecture (2021-2026) & (US$/Unit)
Table 44. Global V2X Communication Chip Sale by Application (2021-2026) & (Million Units)
Table 45. Global V2X Communication Chip Sale Market Share by Application (2021-2026)
Table 46. Global V2X Communication Chip Revenue by Application (2021-2026) & ($ million)
Table 47. Global V2X Communication Chip Revenue Market Share by Application (2021-2026)
Table 48. Global V2X Communication Chip Sale Price by Application (2021-2026) & (US$/Unit)
Table 49. Global V2X Communication Chip Sales by Company (2021-2026) & (Million Units)

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Table 50. Global V2X Communication Chip Sales Market Share by Company (2021-2026)
Table 51. Global V2X Communication Chip Revenue by Company (2021-2026) & ($ millions)
Table 52. Global V2X Communication Chip Revenue Market Share by Company (2021-2026)
Table 53. Global V2X Communication Chip Sale Price by Company (2021-2026) & (US$/Unit)
Table 54. Key Manufacturers V2X Communication Chip Producing Area Distribution and Sales Area
Table 55. Players V2X Communication Chip Products Offered
Table 56. V2X Communication Chip Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 57. New Products and Potential Entrants
Table 58. Market M&A Activity & Strategy
Table 59. Global V2X Communication Chip Sales by Geographic Region (2021-2026) & (Million Units)
Table 60. Global V2X Communication Chip Sales Market Share Geographic Region (2021-2026)
Table 61. Global V2X Communication Chip Revenue by Geographic Region (2021-2026) & ($ millions)
Table 62. Global V2X Communication Chip Revenue Market Share by Geographic Region (2021-2026)
Table 63. Global V2X Communication Chip Sales by Country/Region (2021-2026) & (Million Units)
Table 64. Global V2X Communication Chip Sales Market Share by Country/Region (2021-2026)
Table 65. Global V2X Communication Chip Revenue by Country/Region (2021-2026) & ($ millions)
Table 66. Global V2X Communication Chip Revenue Market Share by Country/Region (2021-2026)
Table 67. Americas V2X Communication Chip Sales by Country (2021-2026) & (Million Units)
Table 68. Americas V2X Communication Chip Sales Market Share by Country (2021-2026)
Table 69. Americas V2X Communication Chip Revenue by Country (2021-2026) & ($ millions)
Table 70. Americas V2X Communication Chip Sales by Type (2021-2026) & (Million Units)

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Table 71. Americas V2X Communication Chip Sales by Application (2021-2026) & (Million Units)
Table 72. APAC V2X Communication Chip Sales by Region (2021-2026) & (Million Units)
Table 73. APAC V2X Communication Chip Sales Market Share by Region (2021-2026)
Table 74. APAC V2X Communication Chip Revenue by Region (2021-2026) & ($ millions)
Table 75. APAC V2X Communication Chip Sales by Type (2021-2026) & (Million Units)
Table 76. APAC V2X Communication Chip Sales by Application (2021-2026) & (Million Units)
Table 77. Europe V2X Communication Chip Sales by Country (2021-2026) & (Million Units)
Table 78. Europe V2X Communication Chip Revenue by Country (2021-2026) & ($ millions)
Table 79. Europe V2X Communication Chip Sales by Type (2021-2026) & (Million Units)
Table 80. Europe V2X Communication Chip Sales by Application (2021-2026) & (Million Units)
Table 81. Middle East & Africa V2X Communication Chip Sales by Country (2021-2026) & (Million Units)
Table 82. Middle East & Africa V2X Communication Chip Revenue Market Share by Country (2021-2026)
Table 83. Middle East & Africa V2X Communication Chip Sales by Type (2021-2026) & (Million Units)
Table 84. Middle East & Africa V2X Communication Chip Sales by Application (2021-2026) & (Million Units)
Table 85. Key Market Drivers & Growth Opportunities of V2X Communication Chip
Table 86. Key Market Challenges & Risks of V2X Communication Chip
Table 87. Key Industry Trends of V2X Communication Chip
Table 88. V2X Communication Chip Raw Material
Table 89. Key Suppliers of Raw Materials
Table 90. V2X Communication Chip Distributors List
Table 91. V2X Communication Chip Customer List
Table 92. Global V2X Communication Chip Sales Forecast by Region (2027-2032) & (Million Units)
Table 93. Global V2X Communication Chip Revenue Forecast by Region (2027-2032) & ($ millions)
Table 94. Americas V2X Communication Chip Sales Forecast by Country (2027-2032) & (Million Units)

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Table 95. Americas V2X Communication Chip Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 96. APAC V2X Communication Chip Sales Forecast by Region (2027-2032) & (Million Units)
Table 97. APAC V2X Communication Chip Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 98. Europe V2X Communication Chip Sales Forecast by Country (2027-2032) & (Million Units)
Table 99. Europe V2X Communication Chip Revenue Forecast by Country (2027-2032) & ($ millions)
Table 100. Middle East & Africa V2X Communication Chip Sales Forecast by Country (2027-2032) & (Million Units)
Table 101. Middle East & Africa V2X Communication Chip Revenue Forecast by Country (2027-2032) & ($ millions)
Table 102. Global V2X Communication Chip Sales Forecast by Type (2027-2032) & (Million Units)
Table 103. Global V2X Communication Chip Revenue Forecast by Type (2027-2032) & ($ millions)
Table 104. Global V2X Communication Chip Sales Forecast by Application (2027-2032) & (Million Units)
Table 105. Global V2X Communication Chip Revenue Forecast by Application (2027-2032) & ($ millions)
Table 106. Huawei Technologies Co., Ltd. Basic Information, V2X Communication Chip Manufacturing Base, Sales Area and Its Competitors
Table 107. Huawei Technologies Co., Ltd. V2X Communication Chip Product Portfolios and Specifications
Table 108. Huawei Technologies Co., Ltd. V2X Communication Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 109. Huawei Technologies Co., Ltd. Main Business
Table 110. Huawei Technologies Co., Ltd. Latest Developments
Table 111. Qualcomm Incorporated Basic Information, V2X Communication Chip Manufacturing Base, Sales Area and Its Competitors
Table 112. Qualcomm Incorporated V2X Communication Chip Product Portfolios and Specifications
Table 113. Qualcomm Incorporated V2X Communication Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 114. Qualcomm Incorporated Main Business
Table 115. Qualcomm Incorporated Latest Developments
Table 116. ZTE Corporation Basic Information, V2X Communication Chip

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Manufacturing Base, Sales Area and Its Competitors
Table 117. ZTE Corporation V2X Communication Chip Product Portfolios and Specifications
Table 118. ZTE Corporation V2X Communication Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 119. ZTE Corporation Main Business
Table 120. ZTE Corporation Latest Developments
Table 121. NXP Semiconductors N.V. Basic Information, V2X Communication Chip Manufacturing Base, Sales Area and Its Competitors
Table 122. NXP Semiconductors N.V. V2X Communication Chip Product Portfolios and Specifications
Table 123. NXP Semiconductors N.V. V2X Communication Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 124. NXP Semiconductors N.V. Main Business
Table 125. NXP Semiconductors N.V. Latest Developments
Table 126. Renesas Electronics Corporation Basic Information, V2X Communication Chip Manufacturing Base, Sales Area and Its Competitors
Table 127. Renesas Electronics Corporation V2X Communication Chip Product Portfolios and Specifications
Table 128. Renesas Electronics Corporation V2X Communication Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 129. Renesas Electronics Corporation Main Business
Table 130. Renesas Electronics Corporation Latest Developments
Table 131. China Information and Communication Technologies Group Corporation Basic Information, V2X Communication Chip Manufacturing Base, Sales Area and Its Competitors
Table 132. China Information and Communication Technologies Group Corporation V2X Communication Chip Product Portfolios and Specifications
Table 133. China Information and Communication Technologies Group Corporation V2X Communication Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 134. China Information and Communication Technologies Group Corporation Main Business
Table 135. China Information and Communication Technologies Group Corporation Latest Developments
Table 136. UNISOC (Shanghai) Technologies Co., Ltd. Basic Information, V2X Communication Chip Manufacturing Base, Sales Area and Its Competitors
Table 137. UNISOC (Shanghai) Technologies Co., Ltd. V2X Communication Chip Product Portfolios and Specifications

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Table 138. UNISOC (Shanghai) Technologies Co., Ltd. V2X Communication Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 139. UNISOC (Shanghai) Technologies Co., Ltd. Main Business
Table 140. UNISOC (Shanghai) Technologies Co., Ltd. Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of V2X Communication Chip
Figure 2. V2X Communication Chip Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global V2X Communication Chip Sales Growth Rate 2021-2032 (Million Units)
Figure 7. Global V2X Communication Chip Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. V2X Communication Chip Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. V2X Communication Chip Sales Market Share by Country/Region (2025)
Figure 10. V2X Communication Chip Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of V2X Baseband Chip
Figure 12. Product Picture of V2X Modem Chip
Figure 13. Product Picture of V2X RF Transceiver
Figure 14. Product Picture of V2X System-on-Chip
Figure 15. Product Picture of V2X Chipset
Figure 16. Product Picture of Other
Figure 17. Global V2X Communication Chip Sales Market Share by Type in 2026
Figure 18. Global V2X Communication Chip Revenue Market Share by Type (2021-2026)
Figure 19. Product Picture of IEEE 802.11p / DSRC
Figure 20. Product Picture of ITS-G5
Figure 21. Product Picture of LTE-V2X
Figure 22. Product Picture of NR-V2X
Figure 23. Product Picture of Multi-standard V2X
Figure 24. Product Picture of Other
Figure 25. Global V2X Communication Chip Sales Market Share by Communication Standard in 2026
Figure 26. Global V2X Communication Chip Revenue Market Share by Communication Standard (2021-2026)
Figure 27. Product Picture of Discrete V2X Chip
Figure 28. Product Picture of Semi-integrated V2X Chip
Figure 29. Product Picture of Integrated V2X SoC

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Figure 30. Product Picture of Integrated Cellular and V2X SoC
Figure 31. Product Picture of Other
Figure 32. Global V2X Communication Chip Sales Market Share by Integration Level in 2026
Figure 33. Global V2X Communication Chip Revenue Market Share by Integration Level (2021-2026)
Figure 34. Product Picture of Direct Sidelink Only
Figure 35. Product Picture of Sidelink and Cellular Dual-connectivity
Figure 36. Product Picture of Hybrid Multi-radio Connectivity
Figure 37. Product Picture of Other
Figure 38. Global V2X Communication Chip Sales Market Share by Connectivity Architecture in 2026
Figure 39. Global V2X Communication Chip Revenue Market Share by Connectivity Architecture (2021-2026)
Figure 40. V2X Communication Chip Consumed in Basic Safety Applications
Figure 41. Global V2X Communication Chip Market: Basic Safety Applications (2021-2026) & (Million Units)
Figure 42. V2X Communication Chip Consumed in Cooperative Perception
Figure 43. Global V2X Communication Chip Market: Cooperative Perception (2021-2026) & (Million Units)
Figure 44. V2X Communication Chip Consumed in Cooperative Driving
Figure 45. Global V2X Communication Chip Market: Cooperative Driving (2021-2026) & (Million Units)
Figure 46. V2X Communication Chip Consumed in Other
Figure 47. Global V2X Communication Chip Market: Other (2021-2026) & (Million Units)
Figure 48. Global V2X Communication Chip Sale Market Share by Application (2025)
Figure 49. Global V2X Communication Chip Revenue Market Share by Application in 2025
Figure 50. V2X Communication Chip Sales by Company in 2025 (Million Units)
Figure 51. Global V2X Communication Chip Sales Market Share by Company in 2025
Figure 52. V2X Communication Chip Revenue by Company in 2025 ($ millions)
Figure 53. Global V2X Communication Chip Revenue Market Share by Company in 2025
Figure 54. Global V2X Communication Chip Sales Market Share by Geographic Region (2021-2026)
Figure 55. Global V2X Communication Chip Revenue Market Share by Geographic Region in 2025
Figure 56. Americas V2X Communication Chip Sales 2021-2026 (Million Units)
Figure 57. Americas V2X Communication Chip Revenue 2021-2026 ($ millions)

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Figure 58. APAC V2X Communication Chip Sales 2021-2026 (Million Units)
Figure 59. APAC V2X Communication Chip Revenue 2021-2026 ($ millions)
Figure 60. Europe V2X Communication Chip Sales 2021-2026 (Million Units)
Figure 61. Europe V2X Communication Chip Revenue 2021-2026 ($ millions)
Figure 62. Middle East & Africa V2X Communication Chip Sales 2021-2026 (Million Units)
Figure 63. Middle East & Africa V2X Communication Chip Revenue 2021-2026 ($ millions)
Figure 64. Americas V2X Communication Chip Sales Market Share by Country in 2025
Figure 65. Americas V2X Communication Chip Revenue Market Share by Country (2021-2026)
Figure 66. Americas V2X Communication Chip Sales Market Share by Type (2021-2026)
Figure 67. Americas V2X Communication Chip Sales Market Share by Application (2021-2026)
Figure 68. United States V2X Communication Chip Revenue Growth 2021-2026 ($ millions)
Figure 69. Canada V2X Communication Chip Revenue Growth 2021-2026 ($ millions)
Figure 70. Mexico V2X Communication Chip Revenue Growth 2021-2026 ($ millions)
Figure 71. Brazil V2X Communication Chip Revenue Growth 2021-2026 ($ millions)
Figure 72. APAC V2X Communication Chip Sales Market Share by Region in 2025
Figure 73. APAC V2X Communication Chip Revenue Market Share by Region (2021-2026)
Figure 74. APAC V2X Communication Chip Sales Market Share by Type (2021-2026)
Figure 75. APAC V2X Communication Chip Sales Market Share by Application (2021-2026)
Figure 76. China V2X Communication Chip Revenue Growth 2021-2026 ($ millions)
Figure 77. Japan V2X Communication Chip Revenue Growth 2021-2026 ($ millions)
Figure 78. South Korea V2X Communication Chip Revenue Growth 2021-2026 ($ millions)
Figure 79. Southeast Asia V2X Communication Chip Revenue Growth 2021-2026 ($ millions)
Figure 80. India V2X Communication Chip Revenue Growth 2021-2026 ($ millions)
Figure 81. Australia V2X Communication Chip Revenue Growth 2021-2026 ($ millions)
Figure 82. China Taiwan V2X Communication Chip Revenue Growth 2021-2026 ($ millions)
Figure 83. Europe V2X Communication Chip Sales Market Share by Country in 2025
Figure 84. Europe V2X Communication Chip Revenue Market Share by Country (2021-2026)

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Figure 85. Europe V2X Communication Chip Sales Market Share by Type (2021-2026)
Figure 86. Europe V2X Communication Chip Sales Market Share by Application (2021-2026)
Figure 87. Germany V2X Communication Chip Revenue Growth 2021-2026 ($ millions)
Figure 88. France V2X Communication Chip Revenue Growth 2021-2026 ($ millions)
Figure 89. UK V2X Communication Chip Revenue Growth 2021-2026 ($ millions)
Figure 90. Italy V2X Communication Chip Revenue Growth 2021-2026 ($ millions)
Figure 91. Russia V2X Communication Chip Revenue Growth 2021-2026 ($ millions)
Figure 92. Middle East & Africa V2X Communication Chip Sales Market Share by Country (2021-2026)
Figure 93. Middle East & Africa V2X Communication Chip Sales Market Share by Type (2021-2026)
Figure 94. Middle East & Africa V2X Communication Chip Sales Market Share by Application (2021-2026)
Figure 95. Egypt V2X Communication Chip Revenue Growth 2021-2026 ($ millions)
Figure 96. South Africa V2X Communication Chip Revenue Growth 2021-2026 ($ millions)
Figure 97. Israel V2X Communication Chip Revenue Growth 2021-2026 ($ millions)
Figure 98. Turkey V2X Communication Chip Revenue Growth 2021-2026 ($ millions)
Figure 99. GCC Countries V2X Communication Chip Revenue Growth 2021-2026 ($ millions)
Figure 100. Manufacturing Cost Structure Analysis of V2X Communication Chip in 2026
Figure 101. Manufacturing Process Analysis of V2X Communication Chip
Figure 102. Industry Chain Structure of V2X Communication Chip
Figure 103. Channels of Distribution
Figure 104. Global V2X Communication Chip Sales Market Forecast by Region (2027-2032)
Figure 105. Global V2X Communication Chip Revenue Market Share Forecast by Region (2027-2032)
Figure 106. Global V2X Communication Chip Sales Market Share Forecast by Type (2027-2032)
Figure 107. Global V2X Communication Chip Revenue Market Share Forecast by Type (2027-2032)
Figure 108. Global V2X Communication Chip Sales Market Share Forecast by Application (2027-2032)
Figure 109. Global V2X Communication Chip Revenue Market Share Forecast by Application (2027-2032)

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