

# ZigBee Chip Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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## Abstracts

### ZigBee Chip Market Summary

#### Introduction

ZigBee chips, based on the IEEE 802.15.4 standard, are low-power, short-range wireless communication solutions designed for IoT applications, particularly in smart homes, lighting, and remote control systems. Operating in the 2.4 GHz ISM band globally, as well as 868 MHz in Europe and 915 MHz in the US, ZigBee chips support mesh networking, enabling reliable, scalable connectivity for low-data-rate devices. The market is highly concentrated, with a few semiconductor giants and specialized firms dominating production. The Connectivity Standards Alliance (CSA) drives standardization, with over 560 certified ZigBee devices launched in 2020, capturing over one-third of the smart home IoT sensor network chip market. Emerging trends include integration with Matter for enhanced interoperability and advancements in energy-efficient chip designs. Challenges include competition from Wi-Fi and Bluetooth, high development costs, and fragmentation in protocol versions.

#### Market Size and Growth Forecast

The global ZigBee chip market is projected to reach USD 400–500 million in 2025, with an estimated compound annual growth rate (CAGR) of 6%–8% through 2030. Growth is driven by the expanding smart home market and IoT adoption, with global ZigBee chip shipments expected to exceed 800 million units by 2025.

#### Regional Analysis

North America, with a growth rate of 6%–8%, is led by the United States, where high smart home adoption and CSA-driven standardization fuel demand for ZigBee chips in lighting and security systems. Canada's smart city initiatives further support growth. Europe, growing at 5.5%–7.5%, sees consumption in Germany and the UK, driven by smart lighting and energy management, with EU sustainability policies boosting adoption. Asia Pacific, with a 6.5%–8.5% growth rate, is driven by China, Japan, and India, where China's smart home market and government-backed IoT projects increase chip use. South America, growing at 5%–7%, is led by Brazil's emerging smart home sector. The Middle East and Africa, with a 5%–7% growth rate, see demand in South Africa and the UAE for smart building applications, limited by infrastructure challenges.

### Application Analysis

**Smart Home:** Growing at 6.5%–8.5%, ZigBee chips dominate home automation, powering devices like thermostats and sensors, with Matter integration enhancing interoperability.

**Remote Control:** With 6%–8% growth, ZigBee chips enable low-power remote control systems, driven by demand for user-friendly IoT interfaces.

**Lighting:** Growing at 6.5%–8.5%, ZigBee chips support smart lighting, with a projected 75% increase in installations by 2025, led by brands like Philips Hue.

**Others:** With 5%–7% growth, niche uses include industrial IoT, limited by competition from alternative protocols.

### Key Market Players

**Texas Instruments:** A US-based semiconductor leader, Texas Instruments supplies ZigBee system-on-chips (SoCs) for smart home and lighting applications, known for energy-efficient designs.

**Nordic Semiconductor:** A Norwegian firm, Nordic Semiconductor produces ZigBee chips for IoT and smart home devices, focusing on low-power solutions.

**NXP Semiconductors:** A Dutch company, NXP Semiconductors offers ZigBee transceivers and microcontrollers for home automation and industrial IoT.

**Silicon Labs:** A US firm, Silicon Labs provides ZigBee modules and SoCs, supporting smart hubs like Samsung's SmartThings.

**Telink Semiconductor:** A Chinese producer, Telink is the first in China to mass-produce ZigBee chips, with 621,900 units sold in 2022, serving smart home markets.

## Porter's Five Forces Analysis

**Threat of New Entrants:** Low to Moderate. High R&D costs, complex chip design, and CSA certification requirements create significant barriers, favoring established players like Texas Instruments. Niche entrants in Asia Pacific may emerge with cost-competitive designs, but scaling is challenging.

**Threat of Substitutes:** High. Wi-Fi, Bluetooth, and Z-Wave compete in IoT applications, offering higher data rates or simpler integration, though ZigBee's low power and mesh networking maintain its niche in smart homes.

**Bargaining Power of Buyers:** Moderate. Smart home device manufacturers have moderate power due to multiple chip suppliers, but high switching costs and the need for CSA-compliant chips limit leverage in certified ecosystems.

**Bargaining Power of Suppliers:** Moderate to High. Suppliers of semiconductor materials and fabrication services hold influence due to concentrated supply chains, impacting costs for non-integrated producers.

**Competitive Rivalry:** High. Intense competition among Texas Instruments, NXP, and regional players like Telink drives innovation and price competition, particularly in commoditized smart home chips, while differentiation occurs in high-performance lighting and industrial applications.

## Market Opportunities and Challenges

### Opportunities

**Smart Home Expansion:** Growing adoption of smart home devices, particularly in North America and Asia Pacific, drives demand for ZigBee chips in lighting, security, and HVAC systems, supported by CSA's Matter initiative.

**Energy Efficiency Trends:** ZigBee's low-power consumption aligns with consumer demand for sustainable IoT devices, boosting applications in battery-operated sensors and lighting.

**IoT Ecosystem Growth:** Expanding IoT applications in industrial automation and healthcare create opportunities for ZigBee chips, leveraging their scalability and reliability.

**Technological Advancements:** Innovations in multi-protocol chips supporting ZigBee, Thread, and Bluetooth enhance interoperability, opening new markets.

**Emerging Market Penetration:** Rising incomes in India and Brazil support smart home adoption, increasing demand for cost-effective ZigBee chips.

## Challenges

**Competition from Alternative Protocols:** Wi-Fi and Bluetooth, offering higher data rates, challenge ZigBee's market share in high-bandwidth IoT applications, requiring differentiation through low-power advantages.

**High Development Costs:** Designing and certifying ZigBee chips demands significant R&D investment, limiting entry for smaller firms and pressuring margins.

**Protocol Fragmentation:** Multiple ZigBee profiles and versions create interoperability challenges, complicating device integration and adoption.

**Supply Chain Risks:** Dependency on semiconductor materials and fabrication exposes the market to global supply chain disruptions, impacting cost stability.

**Limited Consumer Awareness:** In emerging markets like the Middle East and Africa, low awareness of ZigBee's benefits hinders adoption, necessitating education efforts.

## Contents

Table of Content

### **CHAPTER 1 EXECUTIVE SUMMARY**

### **CHAPTER 2 ABBREVIATION AND ACRONYMS**

### **CHAPTER 3 PREFACE**

3.1 Research Scope

3.2 Research Sources

3.2.1 Data Sources

3.2.2 Assumptions

3.3 Research Method

### **CHAPTER 4 MARKET LANDSCAPE**

4.1 Market Overview

4.2 Classification/Types

4.3 Application/End Users

### **CHAPTER 5 MARKET TREND ANALYSIS**

5.1 Introduction

5.2 Drivers

5.3 Restraints

5.4 Opportunities

5.5 Threats

### **CHAPTER 6 INDUSTRY CHAIN ANALYSIS**

6.1 Upstream/Suppliers Analysis

6.2 Zigbee Chip Analysis

6.2.1 Technology Analysis

6.2.2 Cost Analysis

6.2.3 Market Channel Analysis

6.3 Downstream Buyers/End Users

## **CHAPTER 7 LATEST MARKET DYNAMICS**

- 7.1 Latest News
- 7.2 Merger and Acquisition
- 7.3 Planned/Future Project
- 7.4 Policy Dynamics

## **CHAPTER 8 TRADING ANALYSIS**

- 8.1 Export of Zigbee Chip by Region
- 8.2 Import of Zigbee Chip by Region
- 8.3 Balance of Trade

## **CHAPTER 9 HISTORICAL AND FORECAST ZIGBEE CHIP MARKET IN NORTH AMERICA (2020-2030)**

- 9.1 Zigbee Chip Market Size
- 9.2 Zigbee Chip Demand by End Use
- 9.3 Competition by Players/Suppliers
- 9.4 Type Segmentation and Price
- 9.5 Key Countries Analysis
  - 9.5.1 United States
  - 9.5.2 Canada
  - 9.5.3 Mexico

## **CHAPTER 10 HISTORICAL AND FORECAST ZIGBEE CHIP MARKET IN SOUTH AMERICA (2020-2030)**

- 10.1 Zigbee Chip Market Size
- 10.2 Zigbee Chip Demand by End Use
- 10.3 Competition by Players/Suppliers
- 10.4 Type Segmentation and Price
- 10.5 Key Countries Analysis
  - 10.5.1 Brazil
  - 10.5.2 Argentina
  - 10.5.3 Chile
  - 10.5.4 Peru

## **CHAPTER 11 HISTORICAL AND FORECAST ZIGBEE CHIP MARKET IN ASIA &**

**PACIFIC (2020-2030)**

- 11.1 Zigbee Chip Market Size
- 11.2 Zigbee Chip Demand by End Use
- 11.3 Competition by Players/Suppliers
- 11.4 Type Segmentation and Price
- 11.5 Key Countries Analysis
  - 11.5.1 China
  - 11.5.2 India
  - 11.5.3 Japan
  - 11.5.4 South Korea
  - 11.5.5 Southeast Asia
  - 11.5.6 Australia

**CHAPTER 12 HISTORICAL AND FORECAST ZIGBEE CHIP MARKET IN EUROPE (2020-2030)**

- 12.1 Zigbee Chip Market Size
- 12.2 Zigbee Chip Demand by End Use
- 12.3 Competition by Players/Suppliers
- 12.4 Type Segmentation and Price
- 12.5 Key Countries Analysis
  - 12.5.1 Germany
  - 12.5.2 France
  - 12.5.3 United Kingdom
  - 12.5.4 Italy
  - 12.5.5 Spain
  - 12.5.6 Belgium
  - 12.5.7 Netherlands
  - 12.5.8 Austria
  - 12.5.9 Poland
  - 12.5.10 Russia

**CHAPTER 13 HISTORICAL AND FORECAST ZIGBEE CHIP MARKET IN MEA (2020-2030)**

- 13.1 Zigbee Chip Market Size
- 13.2 Zigbee Chip Demand by End Use
- 13.3 Competition by Players/Suppliers

- 13.4 Type Segmentation and Price
- 13.5 Key Countries Analysis
  - 13.5.1 Egypt
  - 13.5.2 Israel
  - 13.5.3 South Africa
  - 13.5.4 Gulf Cooperation Council Countries
  - 13.5.5 Turkey

## **CHAPTER 14 SUMMARY FOR GLOBAL ZIGBEE CHIP MARKET (2020-2025)**

- 14.1 Zigbee Chip Market Size
- 14.2 Zigbee Chip Demand by End Use
- 14.3 Competition by Players/Suppliers
- 14.4 Type Segmentation and Price

## **CHAPTER 15 GLOBAL ZIGBEE CHIP MARKET FORECAST (2025-2030)**

- 15.1 Zigbee Chip Market Size Forecast
- 15.2 Zigbee Chip Demand Forecast
- 15.3 Competition by Players/Suppliers
- 15.4 Type Segmentation and Price Forecast

## **CHAPTER 16 ANALYSIS OF GLOBAL KEY VENDORS**

- 16.1 Texas Instruments
  - 16.1.1 Company Profile
  - 16.1.2 Main Business and ZigBee Chip Information
  - 16.1.3 SWOT Analysis of Texas Instruments
  - 16.1.4 Texas Instruments ZigBee Chip Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.2 Nordic Semiconductor
  - 16.2.1 Company Profile
  - 16.2.2 Main Business and ZigBee Chip Information
  - 16.2.3 SWOT Analysis of Nordic Semiconductor
  - 16.2.4 Nordic Semiconductor ZigBee Chip Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.3 NXP Semiconductors
  - 16.3.1 Company Profile
  - 16.3.2 Main Business and ZigBee Chip Information

- 16.3.3 SWOT Analysis of NXP Semiconductors
- 16.3.4 NXP Semiconductors ZigBee Chip Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.4 Silicon Labs
  - 16.4.1 Company Profile
  - 16.4.2 Main Business and ZigBee Chip Information
  - 16.4.3 SWOT Analysis of Silicon Labs
  - 16.4.4 Silicon Labs ZigBee Chip Sales, Revenue, Price and Gross Margin (2020-2025)

Please ask for sample pages for full companies list

Tables and Figures

- Table Abbreviation and Acronyms List
- Table Research Scope of Zigbee Chip Report
- Table Data Sources of Zigbee Chip Report
- Table Major Assumptions of Zigbee Chip Report
- Figure Market Size Estimated Method
- Figure Major Forecasting Factors
- Figure Zigbee Chip Picture
- Table Zigbee Chip Classification
- Table Zigbee Chip Applications List
- Table Drivers of Zigbee Chip Market
- Table Restraints of Zigbee Chip Market
- Table Opportunities of Zigbee Chip Market
- Table Threats of Zigbee Chip Market
- Table Covid-19 Impact For Zigbee Chip Market
- Table Raw Materials Suppliers List
- Table Different Production Methods of Zigbee Chip
- Table Cost Structure Analysis of Zigbee Chip
- Table Key End Users List
- Table Latest News of Zigbee Chip Market
- Table Merger and Acquisition List
- Table Planned/Future Project of Zigbee Chip Market
- Table Policy of Zigbee Chip Market
- Table 2020-2030 Regional Export of Zigbee Chip
- Table 2020-2030 Regional Import of Zigbee Chip
- Table 2020-2030 Regional Trade Balance
- Figure 2020-2030 Regional Trade Balance
- Table 2020-2030 North America Zigbee Chip Market Size and Market Volume List
- Figure 2020-2030 North America Zigbee Chip Market Size and CAGR
- Figure 2020-2030 North America Zigbee Chip Market Volume and CAGR

Table 2020-2030 North America Zigbee Chip Demand List by Application  
Table 2020-2025 North America Zigbee Chip Key Players Sales List  
Table 2020-2025 North America Zigbee Chip Key Players Market Share List  
Table 2020-2030 North America Zigbee Chip Demand List by Type  
Table 2020-2025 North America Zigbee Chip Price List by Type  
Table 2020-2030 United States Zigbee Chip Market Size and Market Volume List  
Table 2020-2030 United States Zigbee Chip Import & Export List  
Table 2020-2030 Canada Zigbee Chip Market Size and Market Volume List  
Table 2020-2030 Canada Zigbee Chip Import & Export List  
Table 2020-2030 Mexico Zigbee Chip Market Size and Market Volume List  
Table 2020-2030 Mexico Zigbee Chip Import & Export List  
Table 2020-2030 South America Zigbee Chip Market Size and Market Volume List  
Figure 2020-2030 South America Zigbee Chip Market Size and CAGR  
Figure 2020-2030 South America Zigbee Chip Market Volume and CAGR  
Table 2020-2030 South America Zigbee Chip Demand List by Application  
Table 2020-2025 South America Zigbee Chip Key Players Sales List  
Table 2020-2025 South America Zigbee Chip Key Players Market Share List  
Table 2020-2030 South America Zigbee Chip Demand List by Type  
Table 2020-2025 South America Zigbee Chip Price List by Type  
Table 2020-2030 Brazil Zigbee Chip Market Size and Market Volume List  
Table 2020-2030 Brazil Zigbee Chip Import & Export List  
Table 2020-2030 Argentina Zigbee Chip Market Size and Market Volume List  
Table 2020-2030 Argentina Zigbee Chip Import & Export List  
Table 2020-2030 Chile Zigbee Chip Market Size and Market Volume List  
Table 2020-2030 Chile Zigbee Chip Import & Export List  
Table 2020-2030 Peru Zigbee Chip Market Size and Market Volume List  
Table 2020-2030 Peru Zigbee Chip Import & Export List  
Table 2020-2030 Asia & Pacific Zigbee Chip Market Size and Market Volume List  
Figure 2020-2030 Asia & Pacific Zigbee Chip Market Size and CAGR  
Figure 2020-2030 Asia & Pacific Zigbee Chip Market Volume and CAGR  
Table 2020-2030 Asia & Pacific Zigbee Chip Demand List by Application  
Table 2020-2025 Asia & Pacific Zigbee Chip Key Players Sales List  
Table 2020-2025 Asia & Pacific Zigbee Chip Key Players Market Share List  
Table 2020-2030 Asia & Pacific Zigbee Chip Demand List by Type  
Table 2020-2025 Asia & Pacific Zigbee Chip Price List by Type  
Table 2020-2030 China Zigbee Chip Market Size and Market Volume List  
Table 2020-2030 China Zigbee Chip Import & Export List  
Table 2020-2030 India Zigbee Chip Market Size and Market Volume List  
Table 2020-2030 India Zigbee Chip Import & Export List

Table 2020-2030 Japan Zigbee Chip Market Size and Market Volume List  
Table 2020-2030 Japan Zigbee Chip Import & Export List  
Table 2020-2030 South Korea Zigbee Chip Market Size and Market Volume List  
Table 2020-2030 South Korea Zigbee Chip Import & Export List  
Table 2020-2030 Southeast Asia Zigbee Chip Market Size List  
Table 2020-2030 Southeast Asia Zigbee Chip Market Volume List  
Table 2020-2030 Southeast Asia Zigbee Chip Import List  
Table 2020-2030 Southeast Asia Zigbee Chip Export List  
Table 2020-2030 Australia Zigbee Chip Market Size and Market Volume List  
Table 2020-2030 Australia Zigbee Chip Import & Export List  
Table 2020-2030 Europe Zigbee Chip Market Size and Market Volume List  
Figure 2020-2030 Europe Zigbee Chip Market Size and CAGR  
Figure 2020-2030 Europe Zigbee Chip Market Volume and CAGR  
Table 2020-2030 Europe Zigbee Chip Demand List by Application  
Table 2020-2025 Europe Zigbee Chip Key Players Sales List  
Table 2020-2025 Europe Zigbee Chip Key Players Market Share List  
Table 2020-2030 Europe Zigbee Chip Demand List by Type  
Table 2020-2025 Europe Zigbee Chip Price List by Type  
Table 2020-2030 Germany Zigbee Chip Market Size and Market Volume List  
Table 2020-2030 Germany Zigbee Chip Import & Export List  
Table 2020-2030 France Zigbee Chip Market Size and Market Volume List  
Table 2020-2030 France Zigbee Chip Import & Export List  
Table 2020-2030 United Kingdom Zigbee Chip Market Size and Market Volume List  
Table 2020-2030 United Kingdom Zigbee Chip Import & Export List  
Table 2020-2030 Italy Zigbee Chip Market Size and Market Volume List  
Table 2020-2030 Italy Zigbee Chip Import & Export List  
Table 2020-2030 Spain Zigbee Chip Market Size and Market Volume List  
Table 2020-2030 Spain Zigbee Chip Import & Export List  
Table 2020-2030 Belgium Zigbee Chip Market Size and Market Volume List  
Table 2020-2030 Belgium Zigbee Chip Import & Export List  
Table 2020-2030 Netherlands Zigbee Chip Market Size and Market Volume List  
Table 2020-2030 Netherlands Zigbee Chip Import & Export List  
Table 2020-2030 Austria Zigbee Chip Market Size and Market Volume List  
Table 2020-2030 Austria Zigbee Chip Import & Export List  
Table 2020-2030 Poland Zigbee Chip Market Size and Market Volume List  
Table 2020-2030 Poland Zigbee Chip Import & Export List  
Table 2020-2030 Russia Zigbee Chip Market Size and Market Volume List  
Table 2020-2030 Russia Zigbee Chip Import & Export List  
Table 2020-2030 MEA Zigbee Chip Market Size and Market Volume List

Figure 2020-2030 MEA Zigbee Chip Market Size and CAGR  
Figure 2020-2030 MEA Zigbee Chip Market Volume and CAGR  
Table 2020-2030 MEA Zigbee Chip Demand List by Application  
Table 2020-2025 MEA Zigbee Chip Key Players Sales List  
Table 2020-2025 MEA Zigbee Chip Key Players Market Share List  
Table 2020-2030 MEA Zigbee Chip Demand List by Type  
Table 2020-2025 MEA Zigbee Chip Price List by Type  
Table 2020-2030 Egypt Zigbee Chip Market Size and Market Volume List  
Table 2020-2030 Egypt Zigbee Chip Import & Export List  
Table 2020-2030 Israel Zigbee Chip Market Size and Market Volume List  
Table 2020-2030 Israel Zigbee Chip Import & Export List  
Table 2020-2030 South Africa Zigbee Chip Market Size and Market Volume List  
Table 2020-2030 South Africa Zigbee Chip Import & Export List  
Table 2020-2030 Gulf Cooperation Council Countries Zigbee Chip Market Size and Market Volume List  
Table 2020-2030 Gulf Cooperation Council Countries Zigbee Chip Import & Export List  
Table 2020-2030 Turkey Zigbee Chip Market Size and Market Volume List  
Table 2020-2030 Turkey Zigbee Chip Import & Export List  
Table 2020-2025 Global Zigbee Chip Market Size List by Region  
Table 2020-2025 Global Zigbee Chip Market Size Share List by Region  
Table 2020-2025 Global Zigbee Chip Market Volume List by Region  
Table 2020-2025 Global Zigbee Chip Market Volume Share List by Region  
Table 2020-2025 Global Zigbee Chip Demand List by Application  
Table 2020-2025 Global Zigbee Chip Demand Market Share List by Application  
Table 2020-2025 Global Zigbee Chip Key Vendors Sales List  
Table 2020-2025 Global Zigbee Chip Key Vendors Sales Share List  
Figure 2020-2025 Global Zigbee Chip Market Volume and Growth Rate  
Table 2020-2025 Global Zigbee Chip Key Vendors Revenue List  
Figure 2020-2025 Global Zigbee Chip Market Size and Growth Rate  
Table 2020-2025 Global Zigbee Chip Key Vendors Revenue Share List  
Table 2020-2025 Global Zigbee Chip Demand List by Type  
Table 2020-2025 Global Zigbee Chip Demand Market Share List by Type  
Table 2020-2025 Regional Zigbee Chip Price List  
Table 2025-2030 Global Zigbee Chip Market Size List by Region  
Table 2025-2030 Global Zigbee Chip Market Size Share List by Region  
Table 2025-2030 Global Zigbee Chip Market Volume List by Region  
Table 2025-2030 Global Zigbee Chip Market Volume Share List by Region  
Table 2025-2030 Global Zigbee Chip Demand List by Application  
Table 2025-2030 Global Zigbee Chip Demand Market Share List by Application

Table 2025-2030 Global Zigbee Chip Key Vendors Sales List

Table 2025-2030 Global Zigbee Chip Key Vendors Sales Share List

Figure 2025-2030 Global Zigbee Chip Market Volume and Growth Rate

Table 2025-2030 Global Zigbee Chip Key Vendors Revenue List

Figure 2025-2030 Global Zigbee Chip Market Size and Growth Rate

Table 2025-2030 Global Zigbee Chip Key Vendors Revenue Share List

Table 2025-2030 Global Zigbee Chip Demand List by Type

Table 2025-2030 Global Zigbee Chip Demand Market Share List by Type

Table 2025-2030 Zigbee Chip Regional Price List

Table Texas Instruments Information

Table SWOT Analysis of Texas Instruments

Table 2020-2025 Texas Instruments ZigBee Chip Sale Volume Price Cost Revenue

Figure 2020-2025 Texas Instruments ZigBee Chip Sale Volume and Growth Rate

Figure 2020-2025 Texas Instruments ZigBee Chip Market Share

Table Nordic Semiconductor Information

Table SWOT Analysis of Nordic Semiconductor

Table 2020-2025 Nordic Semiconductor ZigBee Chip Sale Volume Price Cost Revenue

Figure 2020-2025 Nordic Semiconductor ZigBee Chip Sale Volume and Growth Rate

Figure 2020-2025 Nordic Semiconductor ZigBee Chip Market Share

Table NXP Semiconductors Information

Table SWOT Analysis of NXP Semiconductors

Table 2020-2025 NXP Semiconductors ZigBee Chip Sale Volume Price Cost Revenue

Figure 2020-2025 NXP Semiconductors ZigBee Chip Sale Volume and Growth Rate

Figure 2020-2025 NXP Semiconductors ZigBee Chip Market Share

Table Silicon Labs Information

Table SWOT Analysis of Silicon Labs

Table 2020-2025 Silicon Labs ZigBee Chip Sale Volume Price Cost Revenue

Figure 2020-2025 Silicon Labs ZigBee Chip Sale Volume and Growth Rate

Figure 2020-2025 Silicon Labs ZigBee Chip Market Share

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