

Global Terahertz Technology Market: Analysis By Component, By Type, By Application, By Region Size and Trends with Impact of COVID-19 and Forecast up to 2029

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Abstracts

The global terahertz technology market was valued at US\$729.59 million in 2023. The market value is expected to reach US\$2.12 billion by 2029. The terahertz technology focuses on the electromagnetic waves in the terahertz frequency. The terahertz frequency falls between infrared and microwave spectrum, which comprises of the frequency of one million oscillations per second. The THz region (located between 0.1 and 10 THz) fosters a vast range of sensing for applications in different fields, such as astronomy, non-destructive characterization of materials, communications, defense and security, medicine, and more. The terahertz technology is non-ionizing, which means its radiation does not affect animals as well as the human body. It penetrates non-conducting materials such as paper, clothing, wood, plastics, and ceramics.

Terahertz waves have emerged as a promising technology in the field of sensing and imaging due to their exceptional properties such as non-ionizing radiation, high penetration, and high-resolution imaging capabilities. Terahertz sensing and imaging has shown great potential in various industries, including biomedical imaging, non-destructive testing, and ultrafast kinetic monitoring. Terahertz waves are also essential for process monitoring and quality control in the manufacturing industries since they allow for the accurate assessment of material properties. Also, this technique is widely used in the medical and pharmaceutical fields, as this is harmless for living organisms as the radiation is highly scattered and not energetic enough to break chemical bonds. Terahertz technology can also contribute to inspecting pipelines for corrosion, structural defects, or material degradation without physical intrusion. Thus, because of the increasing demand for non-destructive testing methods, the terahertz technology market

is anticipated to increase significantly. Furthermore, the implementation of the next-generation mobile network technology 6G is projected to drive the adoption of terahertz technology in the near future. The market is expected to grow at a CAGR of approx. 19.8% during the forecasted period of 2024-2029.

Market Segmentation Analysis:

By Component: The report provides the bifurcation of the market into two segments based on the component: Terahertz Detectors and Terahertz Sources. The terahertz detectors held the highest share in the market and is expected to be the fastest-growing segment in the forecasted period. The growth in the terahertz detectors segment is driven by rising prevalence and demand for detecting, generating, and manipulating coherent terahertz signals across the globe, especially in developed countries such as the US, France, Germany, and Japan. Moreover, terahertz detectors play an increasing role in several applications (e.g., security, biological, drugs and explosions detection, imaging, astronomy applications, etc.). Thus, numerous applications of the terahertz detectors segment proliferate the market's growth. Terahertz (THz) detectors play an increasing role in different areas of human activities.

By Type: The report further provides the segmentation based on the following types: Terahertz Imaging Systems, Terahertz Spectroscopy Systems, and Terahertz Communication Systems. The terahertz imaging systems held the major share of the global terahertz technology market, driven by comprehensive utilization of this technology in the field of non-destructive testing, materials characterization, medical imaging, security, aerospace, and pharmaceutical industries for the analysis of dialytic materials and quality control. In the medical field, Terahertz imaging systems find applications in dermatology, cancer detection, and pharmaceutical research, where they enable non-destructive analysis of biological tissues and pharmaceutical products. Whereas, terahertz communication systems is expected to be the fastest-growing segment in the forecasted period. Terahertz (THz) wireless communication systems have received growing attention given the widespread adoption of fifth-generation (5G) wireless networks and the drive for ever increasing bandwidths. Terahertz communication systems also paved the road towards 6G and beyond.

By Application: The report provides the glimpse of the terahertz technology market based on the following applications: Medical & Healthcare, Industrial, Defense & Security, Semiconductor, Food & Agriculture, and Others. The medical & healthcare segment accounted for the largest revenue share, owing to increased adoption of this technology in various applications such as biomedical imaging, pharmaceutical

analysis, and spectroscopy in the cancer detection. Furthermore, the ability of terahertz technology to provide high-quality imaging results has helped to diagnose several chronic and related diseases at ease across the globe. The continuous improvement in this technology and introduction to more innovative terahertz rays resulted in replacing existing x-rays and infrared rays, further likely to support the market growth. The Defense & Security segment is expected to be the fastest-growing segment in the forecasted period. Terahertz technology are utilized in a wide range of military applications, including intelligence, surveillance, and reconnaissance (ISR), identification of isolated troops behind enemy lines, and terminal guidance of precise weapons. As governments across the world place a greater emphasis on detecting hidden explosives, terahertz technology is in high demand in security and defence applications.

By Region: The report provides insight into the terahertz technology market based on the five regions namely, North America, Europe, Asia Pacific, Middle East & Africa, and Latin America. North America held the major share of the market, as a result of increasing number of homeland security issues, growing investments in military and defense sector, escalating aerospace and automotive industries, and the presence of various regional research and development centers which are working in the field of terahertz technology. The US is the largest region of North America terahertz technology market, driven by government regulations regarding the safety and production of aerospace technologies, and increasing commercial aircraft production. In addition, the telecommunications industry is expected to be a major driver of the market in the coming years, as Terahertz (THz) transmission has emerged as a potential option for communication networks in the 6G future.

Germany stands out in the European terahertz technology market. The region's market growth is being driven by the adoption of advanced safety solutions based on terahertz technology. Furthermore, several firms and research institutes in the region concentrate their efforts on the 6G band spectrum's research and development. India is one of the key player in the Asia Pacific terahertz technology market. In India, the medical and healthcare as well as food & agriculture industry is rising at an impressive pace owing to the rising disposable incomes, rapid urbanization, high population growth, supportive government policies, and growing number of public private partnerships. All these factors are anticipated offer ample growth opportunities for terahertz technology market players in the region.

Market Dynamics:

Growth Drivers: The global terahertz technology market has been growing over the past few years, due to factors such as growing demand of terahertz technology from the military & defense, and medical sectors, growing use of terahertz system in semiconductor industry, rising demand for non-destructive testing, increasing use in wireless communication, increasing use in security and monitoring applications, Government initiatives, and many other factors. The demand for non-destructive testing (NDT) is a significant driving force behind the growth of the Terahertz (THz) technology market. Non-destructive testing methods are crucial across industries such as aerospace, automotive, electronics, pharmaceuticals, and more, where ensuring structural integrity without damaging the tested material is paramount. Terahertz technology offers unique advantages for NDT applications due to its ability to penetrate various materials that are opaque or semi-opaque to visible light, such as plastics, ceramics, composites, and even paper. Unlike traditional NDT methods like X-rays, THz waves are non-ionizing and safe for human exposure, making them suitable for inspecting delicate materials and biological samples. As industries continue to demand more accurate and non-destructive testing methods, the versatile applications of Terahertz technology position it as a pivotal tool driving innovation and efficiency across various sectors.

Challenges: However, the market growth would be negatively impacted by various challenges such as lack of awareness and unavailability of skilled professionals, high costs, etc. Many potential users and decision-makers in industries such as healthcare, security, and manufacturing are unfamiliar with the capabilities and potential applications of THz technology. This lack of awareness often leads to hesitancy in adopting THz solutions, despite their benefits in areas like non-destructive testing, medical imaging, and high-speed communication.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as processing applications of terahertz technology in the food industry, technological advancements, adoption of new technology such as 6G, etc. Terahertz imaging technology offers a non-ionizing alternative to X-rays, making it valuable for quality control and non-destructive testing in industries sensitive to biological agents. In the food industry, THz food scanners are increasingly replacing X-ray machines. They can inspect packaged products like candy bars within cardboard or PE packaging, even penetrating metal-containing foils for enhanced contrast in imaging. Also, Terahertz technology has demonstrated capabilities of supporting data rates up to 100 Gbps, surpassing current wireless communication standards. This technology is being explored for telecommunications beyond 6G, focusing on applications like augmented reality (AR) and autonomous vehicles. For instance, in April 2023, Keysight

Technologies, in collaboration with the National Physical Laboratory (NPL) and the University of Surrey, achieved the first 6G connection at speeds exceeding 100 Gbps using sub-terahertz frequencies.

Impact Analysis of COVID-19 and Way Forward:

While the COVID-19 pandemic posed significant challenges to the global terahertz technology market in 2020, it also accelerated trends that favored the growth of the market. During the epidemic, there was a significant decline in the investments for the terahertz technology product & solution manufacturing and procurement activities with multiple projects on hold due to movement restrictions. Also, the semiconductor and automotive industry exhibited decline, which led to adoption of terahertz technology. In the post-COVID period, the terahertz technology market has seen numerous important shifts, driven by the adoption of digital technologies, rising healthcare applications, growing demand for contactless solutions, and rising research and developments.

Competitive Landscape:

The global terahertz technology market is characterized by intense competition among key players who are striving to expand their market share through product innovation, strategic partnerships, upgradation of current technology, and geographic expansion. The key players in the global terahertz technology market are:

Advantest Corporation
Luna Innovations Incorporated
TeraSense Group
TeraView Limited
TOPTICA Photonics AG
H?BNER GmbH & Co. KG
Menlo Systems
GENTEC-EO
NTT Innovative Devices Corporation
QMC Instruments Ltd
TeraVil Ltd
BATOP GmbH
Bridge12 Technologies, Inc.

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