

Global Active Phased Array TR Module Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Active Phased Array TR Module market size is expected to reach \$ 4735 million by 2032, rising at a market growth of 6.7% CAGR during the forecast period (2026-2032).

Transceiver/receiver (T/R) modules consist of transmit and receive channels. They receive microwave signals, amplify them, and output the signal. The transmit signal is then amplified by the antenna and transmitted. They are core components for signal transmission and reception in radar or communication systems. Common components include transmit/receive switches, digitally controlled multi-mode phase shifters, digitally controlled multi-mode attenuators, solid-state microwave power amplifiers, power circulators, power limiters, low-noise amplifiers, image rejection mixers, and intermediate frequency (IF) signal filtering and amplification circuits. T/R modules are widely used in military applications such as remote sensing, detection, guidance, and air defense, as well as in civilian fields such as satellite communication and navigation, and meteorological monitoring. In 2025, global sales of active phased array (T/R) modules were approximately 920,000 units, with an average unit price of approximately US\$3,200, a capacity utilization rate of approximately 72%, and an industry gross margin of approximately 41%. Upstream companies mainly come from the semiconductor and electronic component sectors, including manufacturers of gallium nitride and gallium arsenide (GaN) RF chips, microwave devices, packaging materials, ceramic substrates, and power modules. The midstream consists of T/R module manufacturers and radar system integrators. Downstream companies are mainly concentrated in military radar, civilian radar, communication systems, and aerospace equipment. In the product cost structure, RF chips and power devices account for approximately 38%, packaging and substrates for approximately 17%, power supply and control circuits for approximately 14%, structure and thermal management for

approximately 11%, assembly and testing for approximately 9%, and R&D and other costs for approximately 11%. TR components have a relatively high cost proportion in phased array systems. In terms of demand analysis, the downstream demand list mainly includes air defense and early warning radar demand, airborne and shipborne radar demand, satellite communication and space monitoring demand, weather radar and air traffic control radar demand, and communication system demand. The downstream customer list mainly includes defense and military units, aerospace companies, radar system manufacturers, communication equipment manufacturers, and research institutions. Regarding business opportunities, policy drivers mainly come from the continuous release of demand for global defense budget growth and radar system upgrades; technological innovation drivers are mainly reflected in gallium nitride devices, high-frequency millimeter-wave technology, and highly integrated packaging, which are driving improvements in the performance and power density of TR components; in terms of changing consumer demands, system users are paying more attention to detection accuracy, anti-interference capabilities, and multi-functional integration capabilities, thereby driving the development of TR components towards high power, miniaturization, low power consumption, and high reliability, while simultaneously driving gradual volume growth in the civilian radar and communication fields.

As one of the most valuable core units in radar systems, the market development of active phased array radar (TR) modules is highly dependent on the upgrading of defense equipment and the evolution of high-end communication technologies. Current trends indicate that the industry is at a critical stage of transitioning from traditional mechanically scanned radar to active phased array radar, a structural change that will continue to drive demand growth for TR modules. The military sector remains the primary driver, with air defense and anti-missile systems, airborne fire control radars, shipborne phased array radars, and space surveillance systems all heavily reliant on TR modules. Furthermore, as countries emphasize information warfare and intelligent combat capabilities, radar systems are evolving towards multi-functional integration, significantly increasing the demands on the quantity and performance of TR modules. In the civilian sector, the gradual introduction of phased array technology into weather monitoring, air traffic control, and autonomous driving perception systems will also become a source of future growth. From a technological perspective, gallium nitride (GaN) technology is accelerating the replacement of traditional gallium arsenide (GaAs) devices, significantly improving the power, efficiency, and high-temperature resistance of TR modules. Simultaneously, the continuous improvement in module integration is driving down costs and expanding application scope. Overall, the industry is characterized by high technological barriers, high concentration, and stable long-term

demand. In the future, with the modernization of the military industry, the development of space technology, and the growth in demand for high-frequency communication, active phased array TR components will maintain strong growth momentum and evolve towards high-end, large-scale, and partial civilian applications.

This report studies the global Active Phased Array TR Module production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Active Phased Array TR Module and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Active Phased Array TR Module that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Active Phased Array TR Module total production and demand, 2021-2032, (Units)

Global Active Phased Array TR Module total production value, 2021-2032, (USD Million)

Global Active Phased Array TR Module production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Active Phased Array TR Module consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Active Phased Array TR Module domestic production, consumption, key domestic manufacturers and share

Global Active Phased Array TR Module production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Active Phased Array TR Module production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Active Phased Array TR Module production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Active Phased Array TR Module market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Kyocera, Honeywell, L3Harris Technologies, Spectrum Control, Mitsubishi Electric, Smartnoble, Alaris Linwave, Hensoldt, Guobo Electronics, CETC 13, etc.

This report also provides key insights about market drivers, restraints, opportunities,

new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Active Phased Array TR Module market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Active Phased Array TR Module Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Active Phased Array TR Module Market, Segmentation by Type:

Digital T/R Module

Analog T/R Module

Global Active Phased Array TR Module Market, Segmentation by Material:

Gallium Arsenide Materials

Silicon-based Materials

Indium Phosphide Materials

Other

Global Active Phased Array TR Module Market, Segmentation by Band:

L-band

S-band

C-band

X-band

Other

Global Active Phased Array TR Module Market, Segmentation by Application:

Military Radar

Civil Radar

Companies Profiled:

Kyocera

Honeywell

L3Harris Technologies

Spectrum Control

Mitsubishi Electric

Smartnoble

Alaris Linwave

Hensoldt

Guobo Electronics

CETC 13

Chengdu RML Technology

Yaguang Technology Group Company

Wuxi Huace Electronic System

Chengdu Tianjian Technology

Key Questions Answered:

1. How big is the global Active Phased Array TR Module market?
2. What is the demand of the global Active Phased Array TR Module market?
3. What is the year over year growth of the global Active Phased Array TR Module market?
4. What is the production and production value of the global Active Phased Array TR Module market?
5. Who are the key producers in the global Active Phased Array TR Module market?
6. What are the growth factors driving the market demand?

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