

Global Active Phased Array TR Module Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Active Phased Array TR Module market size was valued at US\$ 3029 million in 2025 and is forecast to a readjusted size of US\$ 4735 million by 2032 with a CAGR of 6.7% during review period.

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 is a detailed and comprehensive analysis for global Active Phased Array TR Module market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Active Phased Array TR Module market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Active Phased Array TR Module market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Active Phased Array TR Module market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Active Phased Array TR Module market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Active Phased Array TR Module

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Active Phased Array TR Module market based on the following parameters - company overview, sales quantity, revenue, 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.

Market Segmentation

Active Phased Array TR Module market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Digital T/R Module

Analog T/R Module

Market segment by Material

Gallium Arsenide Materials

Silicon-based Materials

Indium Phosphide Materials

Other

Market segment by Band

L-band

S-band

C-band

X-band

Other

Market segment by Application

Military Radar

Civil Radar

Major players covered

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

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Active Phased Array TR Module product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Active Phased Array TR Module, with price, sales quantity, revenue, and global market share of Active Phased Array TR Module from 2021 to 2026.

Chapter 3, the Active Phased Array TR Module competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Active Phased Array TR Module breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Active Phased Array TR Module market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Active Phased Array TR Module.

Chapter 14 and 15, to describe Active Phased Array TR Module sales channel, distributors, customers, research findings and conclusion.

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