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Global Air Conduction Open-back Headphones Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Air Conduction Open-back Headphones market size is expected to reach $ 5317 million by 2032, rising at a market growth of 27.9% CAGR during the forecast period (2026-2032).

Air conduction open-back headphones are a specialized audio device that adopts air conduction technology and open-back structural design, which transmits sound waves to the eardrum through air vibration instead of plugging into the ear canal, and its back cavity is not sealed to realize air circulation; it features no ear canal occlusion, can retain users' perception of ambient sounds while delivering audio, effectively reducing ear fatigue caused by long-term wearing, and balances audio experience and wearing comfort, suitable for scenarios requiring both listening to sound and paying attention to the surrounding environment, with core advantages of comfort, safety and low ear pressure.

In 2025, global Air Conduction Open-back Headphones production reached approximately 5,787 K units, with an average global market price of around US$ 162 per unit.

The supply chain of air conduction open-back headphones forms a demand-driven, closely linked collaborative closed loop: upstream provides core functional components, structural materials and matching auxiliary parts, including air conduction specialized sound units, low-power Bluetooth chips, high-density lightweight batteries, anti-sweat structural materials, soft wearing accessories and noise reduction modules, which directly determine the audio quality, connection stability, wearing comfort and service life of the product; midstream undertakes R&D design (acoustic tuning, open-back structure optimization), precision assembly, functional debugging and quality inspection,

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integrating upstream supplies into finished products that meet audio performance and wearing experience requirements, and optimizes product structure and functions according to downstream demand feedback; downstream covers multi-level sales channels (online e-commerce platforms, offline audio stores, brand direct sales) and diverse terminal scenarios, and the differentiated demands of terminal users for wearing stability, battery life, noise reduction effect and lightweight degree will be transmitted backward to drive midstream to upgrade product configurations and optimize user experience.

The cost structure of air conduction open-back headphones presents a hierarchical distribution dominated by core electronic components and specialized acoustic parts: the largest proportion comes from core functional component costs, including air conduction customized sound units (the core to ensure audio transmission effect), low-power Bluetooth chips (affecting connection stability and power consumption) and high-density lightweight batteries, whose performance directly determines the core experience and product grade of the headphones, accounting for the highest cost ratio; followed by structural and wearing material costs, such as anti-sweat, skin-friendly and lightweight frame materials, soft ear hooks/pads, and open-back cavity structural parts, whose quality is related to wearing comfort and service durability; in addition, there are production assembly and quality inspection costs, relying on standardized processes for component fitting and multi-round testing (audio performance, connection stability, wearing safety) to ensure product consistency; the rest includes R&D design costs for acoustic tuning, open-back cavity noise control and low-power optimization, as well as marketing circulation and after-sales maintenance costs covering channel layout, brand promotion, accessory replacement and after-sales technical support.

This report studies the global Air Conduction Open-back Headphones production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Air Conduction Open-back Headphones 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 Air Conduction Open-back Headphones that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Air Conduction Open-back Headphones total production and demand, 2021-2032, (K Units)

Global Air Conduction Open-back Headphones total production value, 2021-2032, (USD

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Million)
Global Air Conduction Open-back Headphones production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)
Global Air Conduction Open-back Headphones consumption by region & country, CAGR, 2021-2032 & (K Units)
U.S. VS China: Air Conduction Open-back Headphones domestic production, consumption, key domestic manufacturers and share
Global Air Conduction Open-back Headphones production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)
Global Air Conduction Open-back Headphones production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)
Global Air Conduction Open-back Headphones production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Air Conduction Open-back Headphones 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 JBL, Sony, NANK (Naenka), SHOKZ, QCY, Xiaomi, Sanag, BOSE, Beats, OpenRock, 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 Air Conduction Open-back Headphones market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (K 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 Air Conduction Open-back Headphones Market, By Region:

United States

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China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Air Conduction Open-back Headphones Market, Segmentation by Type:

Earhook

Ear Clip

Global Air Conduction Open-back Headphones Market, Segmentation by Single-charge Battery Life:

Short Battery Life Type (12 Hours)

Global Air Conduction Open-back Headphones Market, Segmentation by Charging Mode:

Wired Charging

Wireless Charging

Dual-mode Charging

Global Air Conduction Open-back Headphones Market, Segmentation by Application:

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Online Sales

Offline Sales

Companies Profiled:

JBL

Sony

NANK (Naenka)

SHOKZ

QCY

Xiaomi

Sanag

BOSE

Beats

OpenRock

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Key Questions Answered:

1. How big is the global Air Conduction Open-back Headphones market?
2. What is the demand of the global Air Conduction Open-back Headphones market?
3. What is the year over year growth of the global Air Conduction Open-back Headphones market?
4. What is the production and production value of the global Air Conduction Open-back Headphones market?

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5. Who are the key producers in the global Air Conduction Open-back Headphones market?
6. What are the growth factors driving the market demand?

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Figure 67. Research Process and Data Source

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