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Global Analog Beamforming Chip Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Analog Beamforming Chip market size is expected to reach $ 915 million by 2032, rising at a market growth of 10.5% CAGR during the forecast period (2026-2032).

Analog Beamforming Chip is a multi-channel RF, microwave or millimeter-wave integrated circuit used in phased-array systems to control the relative phase and amplitude of multiple antenna paths in the analog or RF domain. By applying programmable channel weighting before or after frequency conversion, the chip enables electronic beam steering, beam switching, array-gain synthesis, polarization control and, in advanced architectures, simultaneous multi-beam operation. Typical products integrate phase shifters or vector-weighting circuits, variable-gain or attenuation stages, RF splitting and combining networks, digital control interfaces and beam-state memory; higher-integration devices may further incorporate PA, LNA, T/R switching, power detection, temperature compensation or frequency-conversion functions. Commercial Analog Beamforming Chip products are implemented using semiconductor technologies including CMOS, RF-SOI, SiGe BiCMOS and compound-semiconductor processes, with product configurations spanning transmit, receive and bidirectional T/R architectures as well as beamforming-core and active-front-end designs. The research scope focuses on chip-level analog beamforming solutions used in satellite communications, phased-array radar and electronic warfare, 5G millimeter-wave and fixed wireless access, wireless backhaul and other electronically steered RF array applications.

Key Findings

The confirmed Core Formal List comprises 20 group-level Analog Beamforming

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Chip suppliers under the defined narrow market scope

Ku and Ka bands have become strategically important product-development areas for electronically steered satellite communication terminals

Commercial products are moving toward multi-beam operation, higher channel integration, dual-polarization support and lower power consumption

North America retains the deepest established supplier base while China has developed a broader group of emerging domestic Analog Beamforming Chip vendors

Market Trends

Analog Beamforming Chip development is shifting from relatively simple single-beam phase-control devices toward more highly integrated RF front ends capable of supporting multi-beam operation, dual polarization, rapid beam switching and reduced array-level power consumption. Recent product activity reinforces this direction: Qorvo expanded its Ku-band SATCOM beamformer portfolio in 2025, EnSilica introduced Ku-band dual-beam analogue beamforming devices for electronically steered terminals, Sivers moved its Ka-band Cloudchaser beamforming chipset into general availability in 2026, and Analog Devices has extended the architecture toward multi-beam K/Ka devices using programmable delay and attenuation. From a system perspective, the industry is increasingly optimizing beamformer ICs together with antenna layout, RF front-end integration, thermal design, packaging and calibration rather than treating the chip as an isolated phase-control component. The longer-term direction is therefore toward higher functional density and stronger chip-to-array co-design, while analog, digital and hybrid beamforming architectures are expected to coexist according to bandwidth, power, cost and beam-management requirements.

Market Dynamics

Drivers

Growth is principally supported by the increasing use of electronically steered arrays in satellite communications, radar and defense electronics, together with continued deployment of millimeter-wave fixed wireless and specialized high-capacity wireless

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links. Satellite terminals are particularly important because large phased arrays require repeated beamforming channels and must simultaneously meet stringent requirements for low profile, low power consumption, fast beam steering and multi-orbit handover. Sivers, Qorvo and EnSilica are all directing recent product development toward Ku/Ka electronically steered SATCOM terminals, while current commercial portfolios also continue to address 5G and FWA applications. In China, policy support for integrated circuits, aerospace and future 6G development provides an additional environment for localized RF and phased-array semiconductor investment.

Restraints

The principal restraints arise from RF design complexity, thermal density, calibration requirements, packaging loss and the relatively high qualification burden associated with satellite and defense applications. Performance is determined not only by nominal phase resolution or gain range but also by channel-to-channel consistency, noise figure, linearity, output power, temperature drift and antenna-level interaction, making product development materially more demanding than for many conventional single-channel RF components. Higher channel integration can reduce module complexity but can also increase heat concentration and yield sensitivity. In addition, digital beamforming and true-time-delay architectures create technology substitution pressure in applications requiring very wide instantaneous bandwidth, advanced interference suppression or a large number of independently controllable beams.

Opportunities

The most attractive opportunity is the migration of electronically steered satellite terminals from specialized deployments toward broader fixed, mobile, aviation, maritime and defense connectivity applications. Multi-orbit networks increase the value of dual-beam and multi-beam capability because terminals can maintain one link while establishing another, supporting smoother make-before-break handover. Current supplier roadmaps are already reflecting this requirement through new Ku- and Ka-band devices with higher integration and improved power efficiency. Additional opportunities exist in higher-density active arrays, hybrid beamforming architectures, application-specific beamformer ASICs and regional supply-chain localization, particularly where system manufacturers require secure sourcing, long product lifecycles or customized frequency and interface specifications.

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Challenges

The market remains technically demanding and commercially fragmented by frequency band, antenna architecture, semiconductor process and application qualification requirements. A device optimized for 5G FR2 cannot necessarily be transferred directly into a Ku- or Ka-band satellite terminal, and defense programs often impose different reliability, environmental and supply-chain requirements from commercial communications. Long design-in cycles and the need for array-level validation can delay revenue conversion even after a chip reaches sampling. At the same time, suppliers must continuously balance output power, noise performance, channel count, die area and power consumption, while customers increasingly expect more front-end functionality to be integrated into the beamformer. These factors favor suppliers with sustained RFIC design capability, process access, packaging expertise and close system-level engineering support.

Industry Chain Analysis

The Analog Beamforming Chip industry chain begins with semiconductor materials, RF wafer processes, EDA and RF intellectual property, followed by wafer fabrication using CMOS, RF-SOI, SiGe BiCMOS or compound-semiconductor technologies. Midstream value creation is concentrated in beamformer architecture design, phase and amplitude control circuits, PA/LNA integration, RF switching, memory and control logic, wafer fabrication, advanced packaging, RF testing, calibration and reliability qualification. Product architectures vary materially: pSemi, for example, integrates PA/LNA branches, splitters/combiners and programmable phase and amplitude control in an eight-channel beamforming front end, while other suppliers use different combinations of silicon and compound-semiconductor functions depending on output-power and frequency requirements.

Downstream integration moves from the chip into T/R modules, antenna-in-package structures, phased-array panels and complete electronically steered antenna or radar systems. A growing portion of value is created at the interface between IC and array rather than within the silicon die alone because RF routing, package parasitics, thermal management, antenna spacing and calibration directly influence system performance. Raytron’s disclosed capabilities spanning silicon beamforming chips, compound-semiconductor MMICs, T/R modules and phased-array integration illustrate this increasing vertical interaction across the chain. As integration rises, cost competitiveness depends increasingly on process selection, wafer yield, RF packaging,

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test efficiency and the ability to reduce calibration and assembly complexity at the array level.

Segment Insights

By product type, the market is structured around transmit-only, receive-only and bidirectional T/R Analog Beamforming Chip architectures, while integration level ranges from beamforming-core ICs to active beamformers incorporating PA, LNA or switching functions and, in selected designs, frequency conversion. Higher integration is becoming more strategically important because it reduces RF routing and external component count, although the optimal architecture varies with thermal and output-power requirements. By operating frequency, Ku and Ka bands are gaining particular relevance from SATCOM development, while 24–30 GHz-class FR2 devices remain important for 5G, FWA and related millimeter-wave systems. Qorvo, Sivers and EnSilica have all expanded Ku/Ka-oriented product activity, while pSemi continues to offer production beamforming front ends for 5G millimeter-wave applications.

Channel count and beam capability are increasingly useful indicators of product differentiation. Four- and eight-channel configurations remain common in merchant devices because they balance array scalability, package complexity and thermal density, while higher-channel products are used where tighter integration provides clear system-level benefits. Single-beam architectures continue to address many conventional arrays, but dual-beam and multi-beam products are becoming more prominent in satellite systems requiring simultaneous tracking or handover. The technology opportunity is therefore not simply to maximize channel count; competitive designs must optimize channel density, power efficiency, phase and gain accuracy, thermal performance and the number of independently controllable beams for the intended array architecture.

Downstream Market Opportunities

Satellite communications represents the most visible incremental application opportunity because electronically steered user terminals require rapid beam steering, flat-panel form factors and increasingly sophisticated multi-satellite connectivity. Ku- and Ka-band terminal architectures are encouraging suppliers to develop lower-power, dual-polarization and multi-beam devices that can support LEO, MEO and GEO connectivity. Radar and electronic warfare remain structurally important because phased arrays value fast steering, reliability and high RF performance, although qualification cycles are

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typically longer. 5G millimeter-wave and FWA continue to provide commercial demand for integrated active beamforming front ends, particularly where compact CPE, repeaters or point-to-point links require high antenna gain without mechanical steering. Over time, the strongest opportunities are likely to emerge where beamformer IC suppliers can reduce total antenna cost and power consumption rather than merely improve an individual RF specification.

Regional Insights

North America remains the most mature commercial supply center for Analog Beamforming Chip technology, supported by established RF semiconductor platforms, specialist millimeter-wave IC companies and extensive aerospace, defense, satellite and communications design ecosystems. Its competitive advantage is particularly visible in broad product portfolios and sustained investment in highly integrated active-array devices. Europe has a smaller supplier population but retains strong specialization in satellite communications and advanced RFIC design; recent Ku- and Ka-band activity from European suppliers demonstrates an emphasis on electronically steered terminal architectures and regionalized semiconductor supply chains.

China has developed a wider domestic supplier pool spanning specialized phased-array IC designers and larger semiconductor groups, with capabilities extending across C/X/Ku/Ka and higher-frequency analog beamforming technologies. Raytron, for example, publicly identifies multi-channel and multi-beam ABF capability across C/X/Ku/Ka/E/W bands. Domestic industry development is also supported by national priorities around integrated circuits, aerospace and 6G. Japan combines large electronics groups with strong RF and module-integration capability, while India is emerging as a smaller but increasingly relevant RFIC design location. South Korea and Taiwan possess significant millimeter-wave and semiconductor expertise, although the confirmed merchant Analog Beamforming Chip supplier base remains narrower under the report’s defined scope.

Competitive Landscape Analysis

The competitive landscape is concentrated in technological capability but remains diversified by company type. The confirmed Core Formal List contains 20 group-level suppliers after consolidating subsidiaries and acquired businesses under their current parent companies. Large diversified semiconductor groups such as Analog Devices,

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Qorvo, Murata through pSemi, and CG Power through Axiro combine broader RF portfolios, established process access and global customer support, while specialist suppliers such as Sivers, Movandi, Otava, Peraso and EnSilica compete through targeted frequency coverage, higher integration, lower power or application-specific beamforming architectures. Qorvo's recent SATCOM portfolio expansion, Sivers' Ka-band commercialization and EnSilica's Ku-band dual-beam development illustrate how competition is increasingly centered on satellite-terminal requirements rather than on generic phase shifting alone. Chinese suppliers add another competitive layer through localized phased-array chip development across communications, radar and satellite applications. The market therefore does not exhibit a single universal leadership hierarchy across all applications; competitive position depends on frequency coverage, RF performance, multi-beam capability, integration level, qualification, design support and supply-chain reliability.

Report Scope

This report studies the global Analog Beamforming Chip production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Analog Beamforming Chip 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 Analog Beamforming Chip that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Analog Beamforming Chip total production and demand, 2021-2032, (Million Units)

Global Analog Beamforming Chip total production value, 2021-2032, (USD Million)

Global Analog Beamforming Chip production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Units), (based on production site)

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Global Analog Beamforming Chip consumption by region & country, CAGR, 2021-2032 & (Million Units)

U.S. VS China: Analog Beamforming Chip domestic production, consumption, key domestic manufacturers and share

Global Analog Beamforming Chip production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Units)

Global Analog Beamforming Chip production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global Analog Beamforming Chip production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global Analog Beamforming Chip 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 Murata Manufacturing Co., Ltd., Analog Devices, Inc., Qorvo, Inc., Fujikura Ltd., CG Power and Industrial Solutions Limited, Raytron Technology Co., Ltd., Dongguan Mentech Optical & Magnetic Co., Ltd., CETC Chips Technology Inc., Zhejiang Chengchang Technology Co.,Ltd., Sivers Semiconductors AB, 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 Analog Beamforming Chip market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Million 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.

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Global Analog Beamforming Chip Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Analog Beamforming Chip Market, Segmentation by Type:

Transmit Beamformer IC

Receive Beamformer IC

Transmit/Receive Beamformer IC

Other

Global Analog Beamforming Chip Market, Segmentation by Integration Level:

Beamforming Core IC

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Active Beamformer IC

Beamformer with Frequency Conversion

Other

Global Analog Beamforming Chip Market, Segmentation by Operating Frequency:

?18 GHz

>18–30 GHz

>30–50 GHz

>50 GHz

Global Analog Beamforming Chip Market, Segmentation by Channel Count:

1–4 Channels

5–8 Channels

9–16 Channels

>16 Channels

Global Analog Beamforming Chip Market, Segmentation by Application:

Satellite Communications

Radar & Electronic Warfare

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5G mmWave & FWA

Wireless Backhaul

Other Applications

Companies Profiled:

Murata Manufacturing Co., Ltd.

Analog Devices, Inc.

Qorvo, Inc.

Fujikura Ltd.

CG Power and Industrial Solutions Limited

Raytron Technology Co., Ltd.

Dongguan Mentech Optical & Magnetic Co., Ltd.

CETC Chips Technology Inc.

Zhejiang Chengchang Technology Co.,Ltd.

Sivers Semiconductors AB

EnSilica plc

Peraso Inc.

Movandi Corporation

Otava, Inc.

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MISIC Microelectronics Co.,Ltd.

Chengdu CHIPWELL Technology Co., Ltd.

Shanghai Anqiwei Weidianzi Keji Youxian Gongsi

Shenzhen Jingzhun Communication Technology Co., Ltd

FermionIC Design Private Limited

Chengdu Zhirong Keji Youxian Gongsi

Key Questions Answered

1. How big is the global Analog Beamforming Chip market?
2. What is the demand of the global Analog Beamforming Chip market?
3. What is the year over year growth of the global Analog Beamforming Chip market?
4. What is the total value of the global Analog Beamforming Chip market?
5. Who are the Major Players in the global Analog Beamforming Chip market?
6. What are the growth factors driving the market demand?

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