

Global Automotive Millimeter-Wave Radar Cover Heater 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 Automotive Millimeter-Wave Radar Cover Heater market size was valued at US\$ 133 million in 2025 and is forecast to a readjusted size of US\$ 330 million by 2032 with a CAGR of 13.3% during review period.

Automotive millimeter wave radar cover heaters are electric heating components installed on or integrated into the external protective covers of automotive millimeter wave radars, radar emblems, radar-transparent grilles, and localized smart front-end structures. They mainly increase the surface temperature of the radar cover through controlled resistance heating to melt accumulated snow and ice, remove frost and condensation, and reduce the impact of severe weather on millimeter wave radar signal transmission, echo reception, and target recognition stability. This product focuses on external heating structures used for millimeter wave radars in automotive advanced driver assistance systems and autonomous driving perception systems. It is usually composed of flexible heating films, printed conductive circuits, etched metal foils, embedded resistance wires, insulating substrates, adhesive layers, lead terminals, temperature sensing elements, and control interfaces. It can also be integrated with radar covers, emblems, or front-end decorative parts through lamination, hot pressing, insert injection molding, and overmolding processes to form complete assemblies.

The main product forms include standalone flexible heating pads, printed radar heating films, transparent conductive heating films, embedded-wire heating films, radar heating modules with temperature control functions, heated millimeter wave radar emblems, and integrated heated radar covers. Common technical routes include silver paste or copper paste screen printing, copper foil or alloy foil etching, metal resistance wire

embedding, polyimide or polyester film lamination, self-regulating heating based on positive temperature coefficient materials, and carbon nanotube transparent conductive film heating. Product design needs to balance heating uniformity, power density, heating speed, energy consumption, surface temperature difference, thermal cycling life, and automotive electrical safety, while controlling the absorption, reflection, and scattering of heating circuits on 76 to 81 GHz millimeter wave radar signals.

Key specifications usually include 12 V, 24 V, or 48 V operating voltage, an operating temperature range of approximately minus 40 degrees Celsius to 85 degrees Celsius or higher, temperature uniformity within the specified area, target heating time, rated power, resistance tolerance, radar transmission loss, waterproof and dustproof rating, salt spray resistance, vibration resistance, and high and low temperature cycling reliability. The products are mainly used in front millimeter wave radars, hidden emblem radars, smart front-end radars, certain corner radars, and passenger and commercial vehicles that need to maintain perception capability under snow, low temperature, high humidity, and freezing rain conditions. In 2025, the global automotive millimeter wave radar cover heater industry had an average ex-factory price of approximately USD 18 to 22 per set, with an industry average gross margin of approximately 32% to 40%.

Automotive millimeter wave radar cover heaters are evolving from a specialized application of flexible heating technology into an important component of all weather vehicle perception systems. The upstream segment includes polyimide and polyester films, copper foil, resistance alloys, conductive silver and copper pastes, transparent conductive materials, engineering plastics, adhesives, connectors, and temperature sensing components. The midstream segment covers circuit design, printing, metal foil etching, wire embedding, lamination, insert molding, overmolding, electrical connection, power matching, and automotive reliability validation. The downstream segment consists of radar system suppliers, exterior component manufacturers, automotive tier suppliers, and vehicle manufacturers. Product value is increasingly associated with preserving radar availability and reducing perception degradation rather than simply generating heat. This change is raising technical requirements for signal transmission, temperature control, material compatibility, durability, and integration with exterior vehicle structures.

The global supply structure combines advanced material development and system engineering in Europe, Japan, and North America with expanding manufacturing capacity across China, South Korea, and Southeast Asia. European suppliers have developed strong capabilities in printed heating circuits, self regulating resistance technologies, and integration with intelligent front panels. Japanese suppliers are

particularly competitive in radar emblems, flexible circuits, decorative films, precision molding, and integrated exterior components. North American participants have emphasized transparent conductive films, carbon based heating materials, and customized flexible heater design. Asian manufacturing locations are increasingly responsible for film processing, injection molding, assembly, and localized delivery to vehicle programs. The supply chain is gradually moving beyond simple contract production toward joint product development, local engineering support, and regionalized automotive qualification. Joint ventures, licensing arrangements, and manufacturing partnerships remain practical routes for combining heating technology with established exterior component platforms.

Forward radar covers, heated radar emblems, and concealed radar areas within intelligent front panels currently account for the main commercial applications. Heating of corner radar locations remains more selective because installation position, local snow exposure, packaging constraints, and vehicle cost targets vary substantially. Product development is shifting from conventional etched foil and printed silver paste heaters toward lower radar attenuation, improved optical transparency, lighter weight, reduced power consumption, and self regulating temperature behavior. The level of integration between the heater, decorative layer, radio wave transparent substrate, and molded exterior component is increasing. As a result, complete heated radar covers and functional radar emblems generally capture more value than independent heating films. New generations are also incorporating faster warm up, zoned heating, closed loop temperature control, fault detection, and coordinated operation with vehicle thermal and electronic control systems.

Vehicle safety regulations are steadily increasing the adoption of automatic emergency braking, driver assistance functions, and environmental sensing systems, creating a favorable long term foundation for radar related environmental protection components. Demand growth will be led by vehicles sold in cold climates, premium electric vehicles, more advanced driver assistance platforms, and vehicle designs that conceal sensors behind decorative exterior surfaces. At the same time, camera only perception strategies, hydrophobic coatings, washer systems, vibration based cleaning, and software compensation may reduce heater adoption in certain cost sensitive applications. Investment activity is expected to focus on functional films, transparent conductive materials, integrated exterior components, and regional automotive production capacity. New product launches and localized manufacturing projects should improve availability and reduce cost, although long qualification cycles, concentrated customer relationships, strict reliability requirements, and annual automotive price reductions will continue to shape supplier profitability.

Report Scope

This report is a detailed and comprehensive analysis for global Automotive Millimeter-Wave Radar Cover Heater market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Control Method 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 Automotive Millimeter-Wave Radar Cover Heater market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Automotive Millimeter-Wave Radar Cover Heater market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Automotive Millimeter-Wave Radar Cover Heater market size and forecasts, by Control Method and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Automotive Millimeter-Wave Radar Cover Heater market shares of main players, shipments in revenue (\$ Million), sales quantity (K 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 Automotive Millimeter-Wave Radar Cover Heater

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 Automotive Millimeter-Wave Radar Cover Heater 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 Toyoda Gosei Co., Ltd., FORVIA SE, Minth Group Limited, ATT advanced thermal technologies GmbH, NIBE Industrier AB, NOK Corporation, Suntech Co., Ltd., Nissha Co., Ltd., CHASM Advanced Materials, Inc., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Automotive Millimeter-Wave Radar Cover Heater market is split by Control Method and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Control Method, 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 Control Method

Passive Resistive Heater

Self Regulating PTC Heater

Locally Controlled Heater

Vehicle ECU Controlled Heater

Others

Market segment by Heating Technology

Printed Conductive Ink Heater

Etched Metal Foil Heater

Embedded Resistance Wire Heater

Transparent Conductive Film Heater

Others

Market segment by Application

Passenger Cars

Light Commercial Vehicles

Heavy Commercial Vehicles

Others

Major players covered

Toyoda Gosei Co., Ltd.

FORVIA SE

Minth Group Limited

ATT advanced thermal technologies GmbH

NIBE Industrier AB

NOK Corporation

Suntech Co., Ltd.

Nissha Co., Ltd.

CHASM Advanced Materials, Inc.

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)

Chapter Outline

Chapter 1, to describe Automotive Millimeter-Wave Radar Cover Heater product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Automotive Millimeter-Wave Radar Cover Heater, with price, sales quantity, revenue, and global market share of Automotive Millimeter-Wave Radar Cover Heater from 2021 to 2026.

Chapter 3, the Automotive Millimeter-Wave Radar Cover Heater competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Automotive Millimeter-Wave Radar Cover Heater 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 Control Method and by Application, with sales market share and growth rate by Control Method, 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 Automotive Millimeter-Wave Radar Cover Heater market forecast, by

regions, by Control Method, 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 Automotive Millimeter-Wave Radar Cover Heater.

Chapter 14 and 15, to describe Automotive Millimeter-Wave Radar Cover Heater sales channel, distributors, customers, research findings and conclusion.

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