

Global Comb Generator Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Comb Generator market size is expected to reach \$ 47.53 million by 2032, rising at a market growth of 6.2% CAGR during the forecast period (2026-2032).

Comb Generator refers to an RF, microwave or millimeter-wave signal generation device capable of producing evenly spaced spectral lines in the frequency domain. The product scope mainly includes EMC reference comb generators, phase calibration comb generators, harmonic comb generators for frequency synthesis, connectorized comb generator modules, and certain chip/MMIC-based comb generator devices. Its core function is to provide stable, broadband and repeatable reference spectral lines for EMC/EMI testing, test and measurement calibration, VNA/NVNA phase calibration, RF and microwave systems, radar and defense electronics, satellite communications, and mmWave and 5G/6G R&D. Upstream materials and key components mainly include step recovery diodes, nonlinear transmission line chips, GaAs/GaN/Si-based microwave devices, RF connectors, coaxial packages, PCBs, crystal oscillators and clock sources, power management devices, shielding housings, and calibration software. Major downstream customers include EMC test laboratories, third-party testing organizations, test and measurement instrument manufacturers, communications equipment companies, aerospace and defense electronics customers, semiconductor and microwave device R&D institutes, universities, and research laboratories. On an ex-factory price basis, global Comb Generator capacity in 2025 is estimated at about 13,500 units, while global sales volume is estimated at about 9,286 units. Portable EMC products and connectorized modules account for the majority of shipment volume, while high-end phase calibration, broadband microwave and millimeter-wave products have smaller volumes but contribute a higher share of revenue. The global average ex-factory price in 2025 is estimated at about USD 3,250 per unit. Entry-level EMC reference sources and compact modules are typically priced from several hundred to

several thousand US dollars, standard EMC comb generators are mostly priced at several thousand US dollars, and high-end phase calibration and millimeter-wave products can reach several thousand to tens of thousands of US dollars. The average industry gross margin is estimated at about 42%–56% in 2025, with higher margins in calibration-grade, millimeter-wave and specialized test and measurement products, and relatively lower margins in standard EMC reference sources and general-purpose modules.

The global Comb Generator market is a highly specialized segment within professional test and measurement, with demand mainly coming from EMC/EMI testing, RF and microwave calibration, communications equipment R&D, radar and defense electronics, satellite communications, and university and research laboratories. As these products are typically used as reference sources, calibration sources, or frequency synthesis modules, customers place strong emphasis on frequency stability, spectral-line consistency, output repeatability, connector reliability, and calibration data integrity. Purchasing decisions are therefore driven more by performance reliability, brand recognition, system compatibility, and long-term supply capability than by price alone. On the supply side, the market is mainly served by European and U.S. test instrument companies, specialized microwave component suppliers, and EMC equipment manufacturers, while Chinese companies are gradually improving in connectorized modules, harmonic sources, and certain EMC testing accessories. However, high-end phase calibration and millimeter-wave products still present significant entry barriers.

Future market development will benefit from higher operating frequencies in electronic systems, increasing system integration, and stricter EMC compliance requirements. As consumer electronics, automotive electronics, industrial control systems, communications equipment, and aerospace electronics face more complex electromagnetic environments, laboratories and R&D organizations will continue to require stable reference signal sources, chamber verification tools, and test-chain validation equipment. At the same time, the evolution of 5G, early-stage 6G research, automotive millimeter-wave radar, low-earth-orbit satellite communications, and high-frequency semiconductor testing will push test requirements toward higher frequency bands, supporting demand for broadband microwave, millimeter-wave, and low-phase-noise Comb Generators. Product development will focus on wider frequency coverage, higher output stability, stronger phase traceability, more compact modular design, and better compatibility with automated test systems.

Key growth drivers include upgrades in test and measurement infrastructure, localization of RF and microwave test equipment, and increased R&D investment in

defense electronics and communications systems. For EMC-related products, regulatory testing, laboratory expansion, periodic equipment verification, and chamber maintenance will create stable demand. For calibration-grade and frequency-synthesis products, high-end network analyzers, nonlinear device testing, millimeter-wave front-end development, and radar and communications system validation will become important growth areas. As the domestic RF and microwave supply chain continues to improve, Chinese suppliers are expected to gain share in mid- and low-frequency modules, general-purpose harmonic sources, and customized engineering products. However, high-end broadband phase calibration, millimeter-wave packaging, long-term stability, and international calibration systems will still require a longer period of technical accumulation.

The main constraints on the market include limited overall demand, relatively high product customization, long customer validation cycles, and high costs for advanced components and test environments. Comb Generators are not high-volume consumables, and individual customers do not purchase them frequently; demand is more closely linked to laboratory construction, instrument replacement, and project-based R&D schedules. High-end products require strong microwave design capability, packaging technology, calibration expertise, and system-level application experience. Even if new entrants have hardware design capability, they still need to pass long-term reliability verification and customer qualification before entering core supply chains. In addition, the high costs of RF connectors, millimeter-wave chips, broadband packaging, precision calibration, and high-frequency test equipment may slow purchases among price-sensitive customers. Overall, the market is expected to maintain steady growth alongside high-end upgrading, with limited likelihood of rapid volume expansion but continued improvement in product value and technical barriers.

This report studies the global Comb Generator production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Comb Generator total production and demand, 2021-2032, (Units)

Global Comb Generator total production value, 2021-2032, (USD Million)

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

Global Comb Generator consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Comb Generator domestic production, consumption, key domestic manufacturers and share

Global Comb Generator production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Comb Generator production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Comb Generator production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Comb Generator 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 Keysight Technologies, Rohde & Schwarz, MACOM Technology Solutions, Marki Microwave, Quantic PMI, Com-Power Corporation, Picotest, EMI Devices, Absolute EMC, AMCAD MW, 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 Comb Generator 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 Comb Generator Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Comb Generator Market, Segmentation by Type:

EMC Comb Generators

Calibration Comb Generators

Frequency Synthesis Comb Generators

Chip and Module Comb Generators

+

Global Comb Generator Market, Segmentation by Frequency Range:

RF Comb Generators, Below 1 GHz

Microwave Comb Generators, 1 GHz to 40 GHz

Millimeter-Wave Comb Generators, 40 GHz and Above

Global Comb Generator Market, Segmentation by Product Form:

Portable Comb Generators

Bench-Top Comb Generators

Module Comb Generators

Global Comb Generator Market, Segmentation by Application:

EMC/EMI Testing

Test and Measurement Calibration

RF and Microwave Systems

Radar and Defense Electronics

Communications and Aerospace

Research and Laboratory Use

Companies Profiled:

Keysight Technologies

Rohde & Schwarz

MACOM Technology Solutions

Marki Microwave

Quantic PMI

Com-Power Corporation

Picotest

EMI Devices

Absolute EMC

AMCAD MW

Eurofins Scientific

Schwarzbeck Mess-Elektronik

Tekbox Digital Solutions

EMC Instruments Corporation

Techno Science Japan

NEXTEM Corporation

Chengdu SiCore Semiconductor

Chengdu Hongke Electronic Technology

Talent Microwave

Key Questions Answered:

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

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