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Global Millimeter Wave AiP Module Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Millimeter Wave AiP Module market size is expected to reach $ 4951 million by 2032, rising at a market growth of 14.6% CAGR during the forecast period (2026-2032).

Millimeter Wave AiP Module refers to a highly integrated radio-frequency component or module in which millimeter-wave antennas or antenna arrays are co-designed and integrated with RF transceivers, beamforming ICs, radar SoCs and, where required, front-end components such as power amplifiers, low-noise amplifiers, switches, filters and power-management devices at the package or tightly integrated module level. This study focuses on commercially relevant products operating primarily across the 24.25–100 GHz range, covering communication AiP modules, radar AiP/AoP devices, phased-array AiP modules and related integrated antenna packages. Typical implementation technologies include organic-substrate packaging, ceramic/LTCC structures, flip-chip configurations and fan-out/RDL-based integration. Core product functions include millimeter-wave signal transmission and reception, electronic beamforming, FMCW or coherent radar sensing, spatial detection and high-speed wireless connectivity. Major applications include 5G FR2 and fixed wireless access, 60 GHz presence and industrial sensing, automotive in-cabin and radar applications, short-range high-speed connectivity, satellite communications and other professional millimeter-wave systems. Commercial products from leading suppliers confirm that antenna-on-package and antenna-in-package architectures are already deployed across both communication and sensing applications.

Key Findings

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5G mobile, FWA and infrastructure applications represented about 46% of the 2025 modeled revenue mix, remaining the largest segment

60 GHz consumer and industrial sensing contributed roughly 22% of the 2025 modeled revenue mix and is a major structural growth engine

Automotive and professional radar AiP represented about 16% of the 2025 modeled revenue mix, with package-level penetration still developing

The confirmed Core Formal List contains 22 suppliers spanning chip platforms, AiP devices, advanced packaging and module manufacturing

Market Trends

The Millimeter Wave AiP Module market is moving toward deeper antenna-RF-package co-design rather than simple integration of discrete RF components into smaller modules. Higher operating frequencies increase the importance of shortening RF interconnects, controlling dielectric loss and improving antenna-to-chip matching, which strengthens the role of AiP, AoP and related highly integrated architectures. Product development is also becoming more application-specific: communication products emphasize phased-array performance, beam management and compact form factors, while 60 GHz sensing products increasingly integrate antennas, RF front ends and signal-processing functions into single-package devices. At the packaging level, organic substrates, LTCC, fan-out/RDL and SiP-integrated AiP architectures continue to evolve around lower insertion loss, improved thermal management and scalable OTA testing. Commercial portfolios from Qualcomm, Texas Instruments, Infineon and ASE demonstrate this shift from component-level RF design toward increasingly integrated modem-to-antenna, sensor-to-antenna and package-level solutions.

Market Dynamics

Drivers

Market demand is primarily supported by the need for compact high-frequency RF architectures, expansion of 5G FR2 and fixed wireless access, broader adoption of 60 GHz sensing and increasing demand for radar-based contactless detection. At millimeter-wave frequencies, conventional board-level signal paths can introduce

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meaningful transmission loss and layout complexity, making antenna integration increasingly valuable in space-constrained and performance-sensitive products. The availability of commercially active 60–64 GHz AoP radar sensors and 60 GHz AiP sensing portfolios is also lowering system-integration barriers for presence detection, industrial automation and automotive cabin applications.

Restraints

The main restraints arise from advanced packaging cost, high-frequency substrate and material requirements, thermal management, antenna calibration, manufacturing yield and OTA test complexity. AiP also competes with board-level antenna, launcher-in-package and other integrated RF architectures, meaning its technical advantages do not translate into universal adoption across every millimeter-wave application. Product economics are particularly sensitive to array size, RF channel count, package structure and test requirements, while the lack of a single standardized implementation architecture makes cross-platform manufacturing optimization more difficult. Amkor's packaging documentation highlights the continuing trade-offs among AiP, AoP, flexible circuits and alternative substrates in 5G and 6G packaging.

Opportunities

The clearest opportunities are emerging in applications where compact integration, privacy-preserving sensing and electronic beam control provide measurable system value. These include 60 GHz presence and vital-sign sensing, automotive in-cabin detection, intelligent industrial sensors, fixed wireless access and professional phased-array communication systems. Satellite communications and B5G-oriented terminals also create opportunities for customized AiP solutions because antenna arrays must remain physically close to beamforming electronics to reduce path loss. TMY Technology's commercially oriented AiP platforms illustrate the increasing extension of package-level antenna integration from 5G infrastructure toward satellite and other electronically steered antenna systems.

Challenges

Long-term challenges include uneven commercialization across application categories, differences in frequency allocation and system requirements, limited transparency of AiP-specific shipment and pricing data, and continuous competition from alternative RF

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integration approaches. Achieving high-volume manufacturing requires simultaneous control of RF performance, antenna consistency, package warpage, thermal behavior, calibration and OTA production testing. The industry must also manage the economic trade-off between higher integration and repairability or design flexibility, particularly in applications where product volumes remain uncertain. These factors make successful commercialization dependent not only on antenna or semiconductor performance but also on packaging process maturity and end-to-end design capability.

Industry Chain Analysis

The Millimeter Wave AiP Module industry chain begins with semiconductor wafers and RF processes, beamforming and radar ICs, power-management and front-end devices, high-frequency organic or ceramic substrates, redistribution-layer materials, passive components and specialized packaging materials. Value creation then moves into antenna and RF co-design, advanced packaging, SiP/AiP integration, module assembly, calibration and OTA testing. The midstream therefore contains several different supplier models, including fabless RF and radar companies, IDMs, OSATs and specialized module manufacturers. ASE defines AiP as an antenna packaging architecture capable of integrating the RF transceiver and additional front-end components within a compact package or SiP structure, while Amkor has deployed AiP/AoP for high-volume RF module manufacturing.

The value chain becomes progressively more differentiated as frequency, array complexity and integration level increase. RF semiconductor design and antenna architecture determine fundamental performance, while package substrate design, interconnect loss control, thermal design and manufacturing yield directly influence commercial cost. OTA calibration and testing are especially important because highly integrated AiP products may no longer provide conventional RF connectors at individual antenna channels. As a result, competitive advantage increasingly depends on integrated design-to-manufacturing capability rather than on a single component technology, creating strategic importance for companies capable of linking RFIC design, antenna engineering, package development and scalable production testing.

Segment Insights

By application, 5G mobile, fixed wireless access and related infrastructure represented approximately 46% of the 2025 modeled revenue structure and remained the largest

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segment. Consumer and industrial 60 GHz sensing accounted for roughly 22%, while automotive and professional radar AiP contributed around 16%; satellite, B5G and other professional phased-array applications represented about 10%. The remaining share consisted mainly of smaller specialized and long-tail applications. This structure indicates that communication AiP remains the principal revenue base, but the market is gradually becoming less dependent on a single communication-driven demand cycle.

The most visible structural expansion is occurring in 60 GHz sensing and automotive-oriented integrated radar. Texas Instruments offers an active 60–64 GHz AoP device, Infineon maintains a portfolio of 60 GHz sensors with antennas in package, Socionext has commercialized an all-in-one 60 GHz AiP device for in-cabin sensing, and Calterah offers 60 GHz radar SoCs with antenna arrays embedded in the package. These products support a transition toward smaller sensing nodes with reduced antenna-design burden and higher system integration, while communication and satellite AiP continue to favor larger phased arrays and more complex beamforming architectures.

Downstream Market Opportunities

Downstream opportunities are increasingly differentiated by performance requirements rather than simply by end-market size. Smartphones and FWA require compact form factors, high antenna efficiency and sophisticated beam management, while presence sensing and industrial radar place greater emphasis on low power consumption, integrated processing and cost-effective deployment. Automotive in-cabin sensing creates an attractive pathway for highly integrated 60 GHz AiP devices because small size and embedded antennas simplify sensor placement, while SATCOM and professional communication systems provide opportunities for higher-value phased-array AiP designs. The strongest commercial opportunities are therefore likely to emerge where antenna integration eliminates meaningful system-level cost or performance constraints rather than where AiP merely replaces an existing board-level antenna.

Regional Insights

The regional structure reflects a division between semiconductor and system-design leadership and advanced packaging and module-manufacturing capacity. North America has a strong position in 5G modem-to-antenna platforms, radar semiconductors and specialized millimeter-wave technology, while Europe has notable

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strength in 60 GHz sensing and high-frequency semiconductor solutions. East Asia is central to the manufacturing ecosystem: Taiwan and South Korea have strong OSAT, SiP and AiP packaging capabilities, Japan participates through radar semiconductors and high-frequency component technologies, and Mainland China has developed an increasingly broad group of 60 GHz radar AiP and module suppliers. This geographic specialization makes the market dependent on cross-regional semiconductor, substrate, packaging and module supply chains.

From a growth-opportunity perspective, Mainland China is particularly notable for the increasing density of cost-oriented 60 GHz sensing solutions, while North America and Europe remain important for higher-value platform, semiconductor and professional RF technologies. Taiwan and South Korea retain strategic importance on the manufacturing side because advanced packaging is a critical enabling layer for commercial AiP. Regional market development will therefore not be driven by a single geography: communication deployment, automotive sensing adoption and industrial IoT penetration are progressing at different rates, while manufacturing capacity remains concentrated in a relatively small number of semiconductor and advanced-packaging clusters.

Competitive Landscape Analysis

The competitive landscape of the Millimeter Wave AiP Module market is structurally layered rather than governed by a single uniform ranking. The confirmed Core Formal List contains 22 suppliers, but their competitive roles differ materially. Qualcomm competes through an integrated 5G modem-to-antenna platform, while Texas Instruments, Infineon, Socionext and Calterah participate through highly integrated 60 GHz radar and sensing architectures. ASE Technology Holding, Amkor Technology, Powertech Technology and nepes occupy a different strategic layer by providing the advanced packaging and manufacturing capabilities required to commercialize AiP at scale. Specialist suppliers such as Sivers Semiconductors and TMY Technology focus more heavily on phased-array and professional millimeter-wave solutions. Consequently, company scale alone is not an adequate measure of competitive position: product integration, antenna and RF co-design expertise, access to advanced packaging, OTA testing capability and target-application specialization are more meaningful differentiators. Competition is expected to remain segmented, with large semiconductor and packaging groups controlling scale-intensive platforms while smaller specialized suppliers pursue application-specific opportunities in sensing, satellite communications and professional phased arrays.

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Report Scope

This report studies the global Millimeter Wave AiP Module production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Millimeter Wave AiP Module 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 Millimeter Wave AiP Module that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Millimeter Wave AiP Module total production and demand, 2021-2032, (Million Units)

Global Millimeter Wave AiP Module total production value, 2021-2032, (USD Million)

Global Millimeter Wave AiP Module production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Units), (based on production site)

Global Millimeter Wave AiP Module consumption by region & country, CAGR, 2021-2032 & (Million Units)

U.S. VS China: Millimeter Wave AiP Module domestic production, consumption, key domestic manufacturers and share

Global Millimeter Wave AiP Module production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Units)

Global Millimeter Wave AiP Module production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global Millimeter Wave AiP Module production by Application, production, value,

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CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global Millimeter Wave AiP Module 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 Qualcomm Incorporated, ASE Technology Holding Co., Ltd., Texas Instruments Incorporated, Infineon Technologies AG, STMicroelectronics N.V., TDK Corporation, Amkor Technology, Inc., Powertech Technology Inc., Socionext Inc., Hanwha NxMD Corporation, 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 Millimeter Wave AiP Module 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.

Global Millimeter Wave AiP Module Market, By Region:

United States

China

Europe

Japan

South Korea

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ASEAN

India

Rest of World

Market Segmentation

Global Millimeter Wave AiP Module Market, Segmentation by Type:

Communication AiP Module

Radar AiP Module

Phased-Array AiP Module

Other AiP Module

Global Millimeter Wave AiP Module Market, Segmentation by Frequency Band:

24.25–29.5 GHz

37–43.5 GHz

57–71 GHz

76–81 GHz

>81–100 GHz

Other

Global Millimeter Wave AiP Module Market, Segmentation by Antenna Configuration:

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Fixed Antenna

MIMO Antenna Array

Other Antenna Configurations

Global Millimeter Wave AiP Module Market, Segmentation by Polarization:

Single-Polarized

Dual-Polarized

Other

Global Millimeter Wave AiP Module Market, Segmentation by Application:

5G / B5G Wireless Communication

Radar Sensing

Short-Range High-Speed Connectivity

Satellite & Professional Communication

Other Applications

Companies Profiled:

Qualcomm Incorporated

ASE Technology Holding Co., Ltd.

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Texas Instruments Incorporated

Infineon Technologies AG

STMicroelectronics N.V.

TDK Corporation

Amkor Technology, Inc.

Powertech Technology Inc.

Socionext Inc.

Hanwha NxMD Corporation

Calterah Semiconductor Technology (Shanghai) Co., Ltd.

nepes corp.

Sivers Semiconductors AB

TMY Technology Inc.

AirTouch (Shanghai) Intelligent Technology Co., Ltd.

Acconeer AB

Possumic Technology Co., Ltd.

Metawave Corporation

Shenzhen Ai-Thinker Technology Co., Ltd.

Shenzhen Hi-Link Electronic Co., Ltd.

3D Glass Solutions, Inc.

PCB Technologies Ltd.

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Key Questions Answered

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

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