

Global mmWave Antenna Module Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global mmWave Antenna Module market size is expected to reach \$ 18716 million by 2032, rising at a market growth of 10.3% CAGR during the forecast period (2026-2032).

Millimeter-wave antenna modules are integrated RF antenna components designed for high-frequency communication and sensing systems from 24 GHz to 100 GHz. They typically integrate antenna arrays, beamforming circuits, RF front ends, filters, frequency conversion, package substrates, control interfaces, and calibration data into compact modules or package structures to address challenges such as high millimeter-wave propagation loss, sensitivity of feed paths, limited terminal space, and complex beam management. Their core function is to enable high-gain directional transmission and reception, fast beam switching, multi-polarization coverage, and low-loss RF transmission within a constrained form factor. Key technologies include phased-array antennas, antenna-in-package, system-in-package, antenna array integration, RF front-end co-design, over-the-air testing, and thermal management. Typical applications include 5G millimeter-wave smartphones, fixed wireless access terminals, customer premises equipment, small cells, repeaters, automotive and industrial millimeter-wave radar, satellite communication terminals, and R&D validation platforms. Major customers include communication terminal manufacturers, network equipment vendors, automotive electronics suppliers, industrial sensing equipment manufacturers, packaging foundries, operator equipment supply chains, and high-frequency R&D institutions.

Millimeter-wave antenna modules are evolving from simple antenna components into high-frequency integration platforms within communication and sensing systems. As 5G millimeter wave, fixed wireless access, private network coverage, satellite

communications, and high-resolution radar move into scaled validation, the module no longer performs only a radiation function. It must coordinate antenna arrays, beamforming, RF front ends, frequency conversion, package substrates, thermal design, and calibration data within a compact structure. Because millimeter-wave bands have high path loss, weak diffraction, sensitivity to package interconnect loss, and limited terminal space, industry competition is shifting from the performance of individual RF devices to module-level system efficiency. Companies with antenna design, RF chip adaptation, package integration, over-the-air testing, and mass manufacturing capabilities are more likely to secure customer design-ins. Future value growth will mainly come from higher integration, lower insertion loss, broader band coverage, faster beam switching, and more stable mass-production consistency. As terminal form factors change rapidly, customers will increasingly value suppliers that can participate early in structural design and solve RF, electromagnetic, thermal, mechanical, and compliance testing issues at the same time. Supply chain influence will concentrate among suppliers capable of providing complete module solutions and engineering validation capabilities. This will push the industry from a component procurement logic toward platform-based collaborative development.

On the supply side, communication chip vendors, antenna module companies, packaging foundries, electronic manufacturing service providers, and professional test solution vendors are all participating. However, the truly valuable mass-production links are concentrated in antenna array design, antenna-in-package, RF front-end integration, and over-the-air validation. Japan, South Korea, the United States, Taiwan, and mainland China each have different strengths in the value chain. Japanese companies have deeper experience in high-frequency materials, precision modules, and communication components. South Korean companies are more prominent in package substrates, mobile terminals, and communication module collaboration. U.S. companies have strong influence in baseband platforms, RF chips, beamforming, and development platforms. Taiwan and mainland China have strong capabilities in electronic manufacturing, antenna design, packaging services, and system integration. Because terminal customers usually require modules to be optimized together with device structure, RF paths, thermal space, and network standards, suppliers that only provide discrete antennas face difficulty building high barriers. Suppliers with joint development and test validation capabilities are more likely to enter high-end customer supply chains. As frequencies extend higher, product validation will rely more on chambers, probes, calibration algorithms, and consistency testing. Manufacturing capability and validation capability will jointly determine suppliers' long-term competitive positions. As a result, regional industrial specialization will become clearer, and leading customers will prioritize partners with stable delivery experience.

Demand growth is not driven only by rising penetration of millimeter-wave smartphones. It also comes from fixed wireless access, indoor and outdoor coverage enhancement, private-network small cells, automotive and industrial radar, low-earth-orbit satellite terminals, and high-frequency experimental platforms for 6G. Fixed wireless access and repeaters are more sensitive to high gain, long range, low cost, and rapid deployment. Mobile terminals are more sensitive to miniaturization, low power consumption, thermal design, and blockage resistance. Radar sensing is more sensitive to angular resolution, detection range, and signal processing coordination. Satellite terminals place greater emphasis on array scale, beam pointing, and broadband adaptability. Future market expansion will be driven by multiple applications in parallel. Prices may gradually decline for standardized smartphone and customer premises equipment modules, while high-performance phased arrays, automotive-grade radar, satellite terminals, and customized development platforms will continue to maintain higher added value. As high-frequency packaging, low-loss materials, automated testing, and module calibration mature, the manufacturability of millimeter-wave antenna modules will further improve and stimulate growth in upstream materials, packaging equipment, test instruments, and RF design services. In the medium to long term, millimeter-wave antenna modules will become an important cross-sector field connecting wireless communication, intelligent sensing, and high-frequency packaging. Their market potential will continue to expand with upgrades in high-frequency communication infrastructure and smart terminals.

This report studies the global mmWave Antenna Module production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global mmWave Antenna Module total production and demand, 2021-2032, (K Units)

Global mmWave Antenna Module total production value, 2021-2032, (USD Million)

Global mmWave Antenna Module production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global mmWave Antenna Module consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: mmWave Antenna Module domestic production, consumption, key domestic manufacturers and share

Global mmWave Antenna Module production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global mmWave Antenna Module production by Array Scale, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global mmWave Antenna Module production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global mmWave Antenna 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, Murata Manufacturing, Fujikura, Kyocera, Doosan Corporation Electro-Materials, Hanwha NxMD, LG Innotek, Wistron NeWeb Corporation, TMYTEK, Auden Techno, 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 mmWave Antenna Module 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 Array Scale, 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 mmWave Antenna Module Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global mmWave Antenna Module Market, Segmentation by Array Scale:

Below 16 Elements

32 Elements

64 Elements

Over 100 Elements

Global mmWave Antenna Module Market, Segmentation by Beam Method:

Fixed Beam

Analog Phased Array

Digitally Controlled Phased Array

External Platform Control

Global mmWave Antenna Module Market, Segmentation by Terminal Form Factor:

Smartphone Embedded

Customer Premises Equipment

Small Cell Equipment

Repeater Coverage Equipment

Vehicle and Industrial Equipment

Laboratory Platform

Global mmWave Antenna Module Market, Segmentation by Application:

Mobile Terminal Communication

Fixed Wireless Access

Indoor and Outdoor Coverage Enhancement

Small Cell Access

Satellite Communication Terminal

Automotive and Industrial Radar Sensing

R&D Testing and Validation

Companies Profiled:

Qualcomm

Murata Manufacturing

Fujikura

Kyocera

Doosan Corporation Electro-Materials

Hanwha NxMD

LG Innotek

Wistron NeWeb Corporation

TMYTEK

Auden Techno

ASE Technology Holding

Amkor Technology

Texas Instruments

Movandi

Otava

Qorvo

Taoglas

Sivers Semiconductors

Key Questions Answered:

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

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