

Global Quartz Crystals and Oscillators Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/GD980141387FEN.html>

Date: August 2026

Pages: 187

Price: US\$ 4,480.00 (Single User License)

ID: GD980141387FEN

Abstracts

The global Quartz Crystals and Oscillators market size is expected to reach \$ 6993 million by 2032, rising at a market growth of 9.3% CAGR during the forecast period (2026-2032).

A crystal is a piece of piezoelectric material that generates an oscillating sinusoidal electric signal due to the mechanical vibration of its structure. Crystals vibrate at very precise frequencies, so they produce precisely tuned outputs. The crystal oscillator refers to a slice (abbreviated as a wafer) from a quartz crystal at a certain azimuth angle, a quartz crystal resonator, which is simply referred to as a quartz crystal or a crystal, and a crystal oscillator; and a crystal element in which an IC constitutes an oscillation circuit is added inside the package is called Crystal oscillator.

The price of quartz crystal oscillators varies significantly by product type, frequency, frequency stability, operating temperature range, phase noise/jitter performance, package size, output format, and order volume. Standard XOs are generally priced at around USD 0.10?1.00 per piece, TCXOs at around USD 0.50?3.00 per piece, and VCXOs or high-speed differential oscillators at around USD 2?30 per piece. OCXOs are much more expensive due to oven control and low phase-noise requirements, usually above USD 20 per piece, with high-end models exceeding USD 100 per piece. The upstream supply chain includes synthetic quartz, wafer cutting and polishing, electrode materials, ceramic/metal packages, and IC chips. The midstream covers crystal resonator manufacturing, oscillator circuit integration, frequency calibration, packaging, and testing. Downstream applications include communications equipment, consumer electronics, automotive electronics, industrial control, servers, data centers, instruments, aerospace, and defense electronics.

Market Drivers

Rising demand from communications, data centers, and high-speed interconnects

The expansion of 5G/6G base stations, optical communication modules, servers, switches, and data center equipment is increasing demand for high-frequency, low-jitter, and low-phase-noise timing sources. This supports the upgrade of SPXO, TCXO, VCXO, and differential oscillators toward higher frequency, better stability, and lower jitter. High-frequency SPXOs, low-jitter differential oscillators, and high-precision TCXOs are becoming increasingly important in communication networks, data centers, and high-speed interfaces.

Expansion of automotive electronics, industrial IoT, and high-reliability applications

Electric vehicles, ADAS, in-vehicle Ethernet, smart cabins, industrial automation, medical devices, and IoT terminals are increasing demand for wide-temperature, high-reliability, and miniaturized crystal oscillators. As essential timing components for ICs and LSIs, quartz-based devices offer mature advantages in frequency stability, adjustment-free operation, and miniaturization, making them suitable for high-volume electronic systems.

Import substitution and upgrading of high-end frequency control devices

In communications equipment, automotive electronics, servers, industrial control, aerospace, and defense electronics, supply-chain security and localized sourcing are encouraging Chinese suppliers to move from low- to mid-end XO and TCXO products toward high-frequency, low-phase-noise, differential-output, automotive-grade, and high-reliability oscillators. Rising customer requirements for stability, temperature performance, and long-term reliability are also driving investment in crystal processing, packaging, and testing capabilities.

Market Challenges

Intense price competition in low- and mid-end products

Standard XOs and part of the TCXO segment are mature products with many suppliers and relatively high product homogeneity. Price competition is strong, especially in consumer electronics, general industrial control, and low-end IoT applications, where customers are highly cost-sensitive. Suppliers face pressure to offer lower unit prices,

smaller packages, and stable delivery, shifting competition from capacity alone toward cost control, manufacturing automation, and customer qualification capability.

Rising technical barriers in high-end applications

High-end communications, data centers, automotive electronics, aerospace, and defense applications require lower phase noise, lower jitter, wider operating temperature ranges, stronger vibration resistance, better long-term stability, and higher reliability. Suppliers must not only master precision crystal cutting, polishing, electrode deposition, and packaging, but also oscillator circuit design, frequency calibration, aging screening, and reliability validation. This increases R&D investment and lengthens customer qualification cycles.

Substitution pressure from MEMS oscillators and integrated timing solutions

MEMS oscillators are increasingly competitive in miniaturization, shock resistance, vibration resistance, programmability, delivery flexibility, and supply-chain simplification. Programmable MEMS oscillators can cover multiple frequencies and specifications, creating pressure on the traditional quartz oscillator SKU system. As a result, quartz oscillator companies need to keep improving cost efficiency, frequency stability, and high-end performance to defend their market position.

This report studies the global Quartz Crystals and Oscillators production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Quartz Crystals and Oscillators total production and demand, 2021-2032, (M Pcs)

Global Quartz Crystals and Oscillators total production value, 2021-2032, (USD Million)

Global Quartz Crystals and Oscillators production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (M Pcs), (based on production site)

Global Quartz Crystals and Oscillators consumption by region & country, CAGR,

2021-2032 & (M Pcs)

U.S. VS China: Quartz Crystals and Oscillators domestic production, consumption, key domestic manufacturers and share

Global Quartz Crystals and Oscillators production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (M Pcs)

Global Quartz Crystals and Oscillators production by Type, production, value, CAGR, 2021-2032, (USD Million) & (M Pcs)

Global Quartz Crystals and Oscillators production by Application, production, value, CAGR, 2021-2032, (USD Million) & (M Pcs)

This report profiles key players in the global Quartz Crystals and Oscillators 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 TXC, Nihon Dempa Kogyo (NDK), Seiko Epson, Kyocera Crystal Device (KCD), Daishinku Corp (KDS), Microchip, TKD Science and Technology, Hosonic Electronic, Harmony Electronics Corp (H.ELE.), Murata/TEW, 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 Quartz Crystals and Oscillators market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (M Pcs) and average price (US\$/K Pcs) 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 Quartz Crystals and Oscillators Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Quartz Crystals and Oscillators Market, Segmentation by Type:

SPXO

TCXO

VCXO

OCXO

XTAL

Global Quartz Crystals and Oscillators Market, Segmentation by Frequency Range:

Low-Frequency

Medium-Frequency

High-Frequency

Global Quartz Crystals and Oscillators Market, Segmentation by Output Signal:

CMOS/LVCMOS Output

Clipped Sine Wave Output

LVDS Output

LVPECL Output

Others

Global Quartz Crystals and Oscillators Market, Segmentation by Application:

Consumer Electronics

Automotive

Home Appliance

IT & Telecommunication

Medical Equipment

Others

Companies Profiled:

TXC

Nihon Dempa Kogyo (NDK)

Seiko Epson

Kyocera Crystal Device (KCD)

Daishinku Corp (KDS)

Microchip

TKD Science and Technology

Hosonic Electronic

Harmony Electronics Corp (H.ELE.)

Murata/TEW

Failong Crystal Technologies

Micro Crystal

Diodes Incorporated

Siward Crystal Technology

Rakon

Tai-Saw Technology

Nanjing China Electronics Panda Crystal

Taitien

AnHui Jing Sai Technology

Tangshan Guoxin Jingyuan

River Eletec

ZheJiang East Crystal

Abracon

ShenZhen Yangxing Technology (YXC)

Aker Technology

NSK (JenJaan Quartek Corporation)

Key Questions Answered:

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

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