

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

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## Abstracts

The global RF and Microwave Comb Generator market size is expected to reach \$ 33.90 million by 2032, rising at a market growth of 6.6% CAGR during the forecast period (2026-2032).

RF and Microwave Comb Generator is a standardized test and measurement instrument used to generate equally spaced multi-tone comb spectrum signals across RF, microwave, and millimeter-wave frequency ranges. By product form, it can be classified into benchtop comb generators, portable EMC comb generators, and others. Benchtop products are mainly used for broadband phase calibration, metrology calibration, and high-frequency test validation, while portable EMC products are mainly used for EMC/EMI test site verification, anechoic chamber checks, and shielding effectiveness inspection. Other products mainly include connectorized comb generator modules, radiated reference sources, and dedicated products integrated into specific test systems. These products are typically composed of a crystal oscillator or external reference input, step recovery diode or nonlinear transmission line, RF/microwave amplifier, power divider and filtering circuits, RF PCB, SMA, K-type, 2.92 mm high-frequency connectors, metal shielding housing, power management module, control circuit, and calibration accessories. Key upstream inputs include RF semiconductor devices, precision connectors, microwave substrates, metal housings, clock sources, low-noise amplifiers, and calibration services. Major downstream customers include EMC/EMI laboratories, metrology and calibration institutions, test and measurement instrument manufacturers, RF and microwave component companies, communication and satellite communication equipment suppliers, radar and electronic warfare system integrators, universities and research institutes, and antenna test system providers. On the basis of standard models available for direct purchase, global production capacity of RF and Microwave Comb Generators was approximately 5,600 units in 2025, with

shipments of about 3,487 units, an average ex-factory price of around USD 5,960 per unit. Benchtop comb generators have higher unit prices but relatively limited shipment volume, portable EMC comb generators have stronger standardization attributes and stable laboratory demand, and other products are more dependent on test system integration, dedicated frequency coverage, and customer-specific application scenarios. The gross margin of major global manufacturers in 2025 was generally in the range of 42%-60%, with higher margins for high-end metrology calibration, millimeter-wave extension, and low phase noise products, and relatively lower margins for standard EMC reference sources, low-frequency portable products, and general-purpose modules.

The global RF and Microwave Comb Generator market is a specialized segment within test and measurement equipment. Although the overall market size is limited, the technical barrier is relatively high, and customers have strict requirements for frequency coverage, comb stability, output consistency, phase characteristics, and calibration traceability. Current demand is mainly driven by benchtop comb generators and portable EMC comb generators. Benchtop products are mainly used in broadband phase calibration, vector network analyzer calibration, microwave and millimeter-wave link verification, and high-end metrology applications, while portable EMC products are mainly used for EMC/EMI test site verification, anechoic chamber checks, shielding effectiveness inspection, and routine laboratory comparison. Since procurement is often linked to laboratory construction, test system upgrades, metrology capability building, and defense or communication projects, the market is characterized by small batches, high unit value, specialization, and project-driven demand.

From the competitive landscape, major global suppliers are mainly located in the United States, Europe, Japan, and China. European and American companies have stronger experience in high-frequency broadband performance, phase calibration, EMC reference sources, and advanced test and measurement applications. Japanese suppliers have certain strengths in EMC verification and laboratory reference sources, while Chinese suppliers are accelerating adoption in RF and microwave test modules, communication test systems, EMC testing equipment, and research instrument support. Due to the diverse application scenarios, manufacturers generally do not rely on large-scale standardized production, but instead build multi-model, small-batch product portfolios based on frequency range, comb spacing, output mode, phase characterization requirements, and accessory configurations. For customers, historical test data, calibration capability, product consistency, long-term reliability, and after-sales support are often more important than price alone.

Future market growth will be mainly supported by millimeter-wave communication, satellite communication, automotive radar, broadband phased-array antennas, electronic warfare systems, high-frequency semiconductor device testing, and continued investment in EMC laboratories. As communication and radar systems move toward higher frequencies, wider bandwidths, and more complex link architectures, testing processes will require stronger capabilities in multi-tone synchronous excitation, broadband phase reference, spectrum consistency verification, and system-level calibration. This will further enhance the value of benchtop comb generators in high-end calibration and metrology scenarios. At the same time, stricter EMC testing requirements, more frequent chamber revalidation, and growing demand for portable site verification will support stable demand for portable EMC comb generators. Miniaturization, modularization, wider bandwidth, and higher frequency coverage will become important product development directions.

Key market restraints include relatively narrow application scenarios, limited customer purchasing frequency, long product validation cycles, and high technical difficulty in high-frequency broadband development. Advanced products need stable performance in output power flatness, phase consistency, low phase noise, temperature stability, and connector loss control, requiring strong capabilities in RF and microwave design, precision manufacturing, calibration testing, and system-level application experience. Meanwhile, these products are not general-purpose laboratory instruments, and customers usually have long replacement cycles once existing equipment can meet their requirements. New demand may also be affected by research budgets, defense project timing, laboratory construction cycles, and changes in capital expenditure. Therefore, although the market has clear technology-driven growth potential, its overall growth is expected to remain steady and moderate.

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

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

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global RF and Microwave 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, Com-Power Corporation, Eurofins York, Tekbox Digital Solutions, Schwarzbeck Mess-Elektronik, AMCAD Engineering, Furaxa, Quantic PMI, RFSPACE, 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 RF and Microwave 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 RF and Microwave Comb Generator Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global RF and Microwave Comb Generator Market, Segmentation by Type:

Benchtop Comb Generator

Portable EMC Comb Generator

Others

#### Global RF and Microwave Comb Generator Market, Segmentation by Frequency Range:

Below 1 GHz

1-18 GHz

18-40 GHz

40 GHz and Above

#### Global RF and Microwave Comb Generator Market, Segmentation by Comb Spacing:

?10 MHz

25-100 MHz

Above 100 MHz

#### Global RF and Microwave Comb Generator Market, Segmentation by Application:

EMC / EMI Testing

Calibration and Metrology

RF and Microwave Component Testing

Communication and Radar Systems

Research and Laboratory

Others

#### Companies Profiled:

Keysight Technologies

Rohde & Schwarz

Com-Power Corporation

Eurofins York

Tekbox Digital Solutions

Schwarzbeck Mess-Elektronik

AMCAD Engineering

Furaxa

Quantic PMI

RFSPACE

Techno Science Japan

Chengdu Hongke Electronics Technology

Talent Microwave

Key Questions Answered:

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

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