

Global SAW Component Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G99D2111F36CEN.html>

Date: April 2026

Pages: 143

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

ID: G99D2111F36CEN

Abstracts

The global SAW Component market size is expected to reach \$ 11496 million by 2032, rising at a market growth of 8.5% CAGR during the forecast period (2026-2032).

SAW components are key RF passive devices that use the surface acoustic wave effect to perform frequency selection, isolation, multiplexing, and frequency control. Their core purpose is to allow target frequency bands to pass efficiently in complex wireless links, while suppressing adjacent-channel and out-of-band interference, and separating transmit and receive signals in systems where both coexist. Based on the product scope shown on official product pages, this category is not limited to a single SAW filter, but has expanded into a device family that includes filters, duplexers, diplexers or multiplexers, resonators, and certain frequency control devices. Its core technical paradigm is to use piezoelectric materials and fine patterning processes to convert surface acoustic wave propagation characteristics into standard products that can be mass-produced, packaged, and directly mounted into RF signal chains. Typical applications are concentrated in smartphones and tablets, Wi-Fi and Bluetooth modules, GPS and GNSS positioning, ISM and IoT devices, smart meters, automotive wireless and battery management systems, base stations and cellular infrastructure, satellite and CATV, industrial communications, and certain radar scenarios. Corresponding customers mainly include handset and communications equipment manufacturers, automotive electronics and industrial equipment makers, module and solution providers, and RF engineering teams that require catalog-based sourcing or joint development. Common delivery forms include standard catalog parts, compact SMD devices, duplexer and multiplexer arrays, resonators, and customized or foundry services.

The foundation of the SAW component industry remains highly solid because it serves

the most fundamental and rigid RF signal management needs in wireless systems. Whether in smartphones, tablets, routers, smart meters, GNSS terminals, industrial wireless nodes, or satellite reception equipment, as long as a system needs target-band transmission, adjacent-channel suppression, transmit-receive isolation, and frequency stability under limited spectrum resources, SAW devices continue to hold strong engineering value. Official product portfolios show that the industry is no longer confined to standalone filters, but has evolved into a coordinated device ecosystem comprising filters, duplexers, quadplexers, multiplexers, resonators, and certain frequency control devices. This structure indicates that SAW components are not merely a single-part market, but a critical base layer within the broader RF front-end architecture. As terminal design moves toward higher integration, smaller form factors, and more complex band combinations, customers are simultaneously demanding lower insertion loss, higher selectivity, more stable temperature performance, and scalable supply capability. This trend strengthens the long-term advantage of vendors with deep process know-how and large-scale manufacturing capacity.

From a growth perspective, incremental demand for SAW components is expanding from traditional mobile communications into broader wireless scenarios. One clear trend is that IoT and automotive electronics are becoming new volume drivers. Kyocera has already highlighted smart meters and 2.4GHz wBMS as SAW-related application scenarios, while TAIYO YUDEN directly positions its RF devices for automotive applications with high-reliability capability. This means the demand boundary for SAW is expanding from consumer electronics into industrial and vehicle-based systems. At the same time, 3GPP Release 17 introduced RedCap, NTN, and enhanced RF requirements for FR1, creating a clearer roadmap for medium-speed, low-power, wide-coverage 5G IoT devices, which typically rely more on cost-effective and mature RF filtering and isolation solutions. Combined with the IEA expectation that global electric car sales will exceed 20 million units in 2025, automotive connectivity, wireless battery management, remote monitoring, and assisted positioning are all likely to drive additional demand for components spanning sub-1GHz through L-band. In that sense, SAW components are not a category moving toward marginalization, but a foundational segment that continues to benefit from the diffusion of new wireless end devices.

From the standpoint of competition and regional specialization, the SAW component industry has already formed a relatively clear global supply network, with East Asia as the absolute core production region. Vendors in Japan, South Korea, mainland China, and Taiwan hold the strongest positions in mass production depth, catalog breadth, package miniaturization, and automotive-grade reliability, while European and U.S. suppliers maintain solid positions in niche frequencies, navigation, industrial

communications, customization, and supplementary supply. This does not imply a closed market. On the contrary, it shows that the industry has a strongly global sales character. Microsaw explicitly states worldwide supply, while Qorvo's application pages span Wi-Fi, Bluetooth, cellular infrastructure, automotive, CATV, satellite, and aerospace, and Murata and Temwell likewise target engineering customers across regions and industries. At the same time, the EU Radio Equipment Directive continues to impose requirements around safety, spectrum efficiency, privacy, and software-related compliance for wireless equipment. As compliance thresholds and validation costs rise, the primary beneficiaries are typically not low-end substitutes, but established suppliers capable of offering stable parameters, consistent quality, long-term supply, and engineering support. Accordingly, the industry is more likely to move toward a healthy expansion pattern of large-scale leading manufacturers plus regional specialty suppliers, rather than pure price competition.

This report studies the global SAW Component production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global SAW Component total production and demand, 2021-2032, (K Units)

Global SAW Component total production value, 2021-2032, (USD Million)

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

Global SAW Component consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: SAW Component domestic production, consumption, key domestic manufacturers and share

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

Global SAW Component production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global SAW Component production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global SAW Component 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 Murata Manufacturing Co., Ltd., Kyocera Corporation, Nisshinbo Micro Devices Inc., TAIYO YUDEN CO., LTD., NIHON DEMPA KOGYO CO., LTD., Qorvo, Inc., SAW COMPONENTS Dresden GmbH, Microsaw Oy, ECS Inc., Raltron Electronics, 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 SAW Component 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 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 SAW Component Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global SAW Component Market, Segmentation by Type:

Wave Filter

Resonator

Oscillator

Other

Global SAW Component Market, Segmentation by Product Form:

Bandpass Filtering

Transmit Receive Isolation

Multi Frequency Multiplexing

Frequency Stabilization

Global SAW Component Market, Segmentation by Supply Mode:

Standard Production

Custom Development

Global SAW Component Market, Segmentation by Application:

Telecom

Electronic Product

Aviation

Automobile

Other

Companies Profiled:

Murata Manufacturing Co., Ltd.

Kyocera Corporation

Nisshinbo Micro Devices Inc.

TAIYO YUDEN CO., LTD.

NIHON DEMPA KOGYO CO., LTD.

Qorvo, Inc.

SAW COMPONENTS Dresden GmbH

Microsaw Oy

ECS Inc.

Raltron Electronics

TechPoint Golledge

ITF Co., Ltd.

SAWNICS Inc.

C-Tech Co., Ltd.

Tai-Saw Technology Co., Ltd.

Walsin Technology Corporation

Temwell Corporation

Shenzhen Yangxing Technology Co., Ltd.

Vanlong Technology Co., Ltd.

Wuhan TGS Crystals Ltd.

Key Questions Answered:

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

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