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Global Specific Absorption Rate(SAR) Probe Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Specific Absorption Rate(SAR) Probe market size is expected to reach $ 122 million by 2032, rising at a market growth of 6.2% CAGR during the forecast period (2026-2032).

In 2025, global sales volume for Specific Absorption Rate (SAR) probes was approximately 4,200 units, with an average global market price of around $18,000 per unit. That year, total global production capacity for SAR probes reached approximately 5,600 units per year, and the industry's average gross profit margin stood at about 55%. A Specific Absorption Rate (SAR) probe is a precision sensor used to measure the strength of radio-frequency (RF) electric fields within human body phantoms and to calculate the level of electromagnetic energy absorption from wireless devices. These products typically feature a miniature tri-axial isotropic electric field probe structure capable of simultaneously detecting electric field components in three orthogonal directions while scanning within head or torso phantoms filled with tissue-simulating liquid. Based on the measured electric field strength, as well as the conductivity and density of the simulating liquid, the SAR testing system calculates the local specific absorption rate (measured in W/kg). These systems are primarily used for RF exposure compliance testing of mobile phones, tablets, wearable devices, wireless communication terminals, and antennas. Key performance indicators include frequency range, isotropy error, dynamic range, linearity, spatial resolution, probe tip dimensions, sensitivity, and calibration uncertainty.

Upstream components primarily include miniature dipole or electric field sensing elements, Schottky detector diodes, low-dielectric-constant probe shafts, optical fibers or high-impedance transmission lines, precision resistors and capacitors, low-noise signal conditioning circuits, photoelectric converters, connectors, and calibration

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standards. Ancillary materials include raw ingredients for tissue-simulating liquids, human body phantoms, dielectric parameter measurement sensors, RF power sources, power amplifiers, and reference antennas. Because the probe must maintain minimal electromagnetic disturbance, high isotropy, and stable sensitivity within a liquid environment, factors such as the dielectric properties of upstream materials, sensor consistency, packaging hermeticity, and traceable calibration capabilities directly impact measurement accuracy. The midstream sector consists mainly of SAR probe manufacturers, SAR testing system suppliers, and metrology/calibration service providers; they are responsible for probe structural design, integration of tri-axial sensing units, development of signal acquisition circuits, frequency response compensation, sealing for liquid environments, probe calibration, and uncertainty assessment. SAR probes generally do not operate in isolation but function as part of a complete system comprising a six-axis robot or 3D scanning platform, a human body phantom, a data acquisition unit, dielectric measurement equipment, and SAR calculation software. Technical barriers in the industry center on probe miniaturization, wide frequency coverage, low-disturbance near-field measurement, consistency of tri-axial response, automatic scanning algorithms, and the traceability of calibration data. Downstream sectors primarily include manufacturers of smartphones and wireless terminals, communication equipment enterprises, wearable device vendors, automotive wireless electronics companies, and manufacturers of antennas and RF modules, as well as third-party testing and certification laboratories, government regulatory laboratories, universities, and research institutions. Typical applications encompass SAR testing for mobile phones (head and body exposure), wireless exposure testing for tablets and laptops, testing for wearables such as smartwatches, and compliance verification for Wi-Fi, Bluetooth, cellular communication, and other RF-enabled devices. With the expansion of wireless device frequency bands and the widespread adoption of multi-antenna and carrier aggregation technologies, SAR measurement is evolving toward wider frequency ranges, smaller probe sizes, higher scanning efficiency, and automated multi-device testing.

The development of Specific Absorption Rate (SAR) measurement probes has been primarily driven by the proliferation of wireless devices and the expansion of regulatory requirements regarding RF exposure compliance. Devices such as smartphones, tablets, laptops, smartwatches, wireless headsets, AR/VR gear, and IoT terminals increasingly integrate multiple wireless technologies—including cellular, Wi-Fi, Bluetooth, and NFC—while the operating distance between the device and the human body continues to shrink. Technologies such as multi-antenna arrays, carrier aggregation, and simultaneous transmission have further complicated exposure assessment, compelling device manufacturers and third-party testing laboratories to continuously

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acquire, upgrade, and calibrate SAR measurement probes.

The adoption of 5G, Wi-Fi 6E/7, and new frequency bands serves as a key technological driver. While traditional probes typically covered the range from several hundred MHz to 6 GHz, current products are extending their reach toward 10 GHz and enhancing measurement accuracy in environments characterized by steep field gradients and complex modulated signals. As antenna sizes decrease and the proximity to the human body narrows, SAR distributions exhibit sharper variations; consequently, the industry demands probes featuring miniaturized tips, reduced sensor offset distances, higher spatial resolution, superior isotropy, and minimal field perturbation.

Future product technology will evolve toward broadband capability, miniaturization, high dynamic range, and digital calibration. Next-generation probes will incorporate compact tri-axial sensing units, low-dielectric-constant packaging materials, low-noise detection circuits, and fiber-optic or high-impedance signal transmission structures, while utilizing frequency response compensation and modulation-dependent correction to ensure accuracy with complex signals. Furthermore, these probes will integrate features such as automatic identification, collision protection, liquid level detection, temperature compensation, and calibration databases to minimize manual configuration errors and reduce the time required to switch between frequency bands, tissue-simulating liquids, and device configurations.

Report Scope

This report studies the global Specific Absorption Rate(SAR) Probe production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Specific Absorption Rate(SAR) Probe 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 Specific Absorption Rate(SAR) Probe that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Specific Absorption Rate(SAR) Probe total production and demand, 2021-2032, (K Units)

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Global Specific Absorption Rate(SAR) Probe total production value, 2021-2032, (USD Million)

Global Specific Absorption Rate(SAR) Probe production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Specific Absorption Rate(SAR) Probe consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Specific Absorption Rate(SAR) Probe domestic production, consumption, key domestic manufacturers and share

Global Specific Absorption Rate(SAR) Probe production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Specific Absorption Rate(SAR) Probe production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Specific Absorption Rate(SAR) Probe production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Specific Absorption Rate(SAR) Probe 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 IndexSAR, SPEAG, Microwave Vision Group, APREL, KAPTEOS, TDK RF Solutions, 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 Specific Absorption Rate(SAR) Probe market

Detailed Segmentation:

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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 Specific Absorption Rate(SAR) Probe Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Specific Absorption Rate(SAR) Probe Market, Segmentation by Type:

Tri-axial Isotropic SAR Probe

Single-sensor Rotating SAR Probe

Dual-axis or Quasi-vector Probe

Array-type SAR Probe

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Global Specific Absorption Rate(SAR) Probe Market, Segmentation by Maximum Operating Frequency:

Low-frequency and Conventional Cellular (up to 3 GHz)

Medium-to-high Frequency(3–6 GHz)

Wideband(6–10 GHz)

Millimeter Wave (above 10 GHz)

Global Specific Absorption Rate(SAR) Probe Market, Segmentation by Measurement Principle:

Miniature Dipole-diode Detector Probe

Electro-optic Probe

Temperature-rise Dosimetric Probe

Frequency-selective Probe

Global Specific Absorption Rate(SAR) Probe Market, Segmentation by Operating Medium:

Tissue-mimicking Fluid Probe

Universal Probe (Air/Liquid)

Others

Global Specific Absorption Rate(SAR) Probe Market, Segmentation by

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Application:

Smartphones and Cellular Communication Terminals

Tablets and Portable Computing Devices

Wearable and Body-worn Wireless Devices

IoT and Other Short-range Wireless Devices

Medical Devices and Scientific Research Applications

Companies Profiled:

IndexSAR

SPEAG

Microwave Vision Group

APREL

KAPTEOS

TDK RF Solutions

Key Questions Answered

1. How big is the global Specific Absorption Rate(SAR) Probe market?
2. What is the demand of the global Specific Absorption Rate(SAR) Probe market?
3. What is the year over year growth of the global Specific Absorption Rate(SAR) Probe market?
4. What is the total value of the global Specific Absorption Rate(SAR) Probe market?
5. Who are the Major Players in the global Specific Absorption Rate(SAR) Probe market?
6. What are the growth factors driving the market demand?

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