

# Waveguide Market Size, Share & Trends Analysis Report By Component (Adapters, Couplers, Loads & Filters, Isolators & Circulators, Phase Shifters, Power Combiners), By Type, By End-user, By Region, And Segment Forecasts, 2022 - 2030

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## Abstracts

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### Waveguide Market Growth & Trends

The global waveguide market size is expected to reach USD 2.14 billion by 2030, according to a new report by Grand View Research, Inc. The market is anticipated to expand at a CAGR of 5.8% from 2022 to 2030.

A waveguide is a structure that guides electromagnetic, radio, or sound waves with the least amount of energy loss, restricting energy transmission. These are used when a collection of devices are linked together to send signals over great distances. Radar installations, broadcasting, and microwave communications all use this electromagnetic feed line. Waveguides are frequently utilized in optical interferometers, non-linear devices, photonic integrated circuits, and optical communication.

The waveguide component segment has been further segmented into adapters, couplers, loads & filters, isolators & circulators, phase shifters, power combiners, pressure windows, and others. Among these, the phase shifters segment dominated the overall market, valued at USD 291.2 million and growing at a CAGR of 5.6%. These are 2-port waveguide modules that change the phase of an output signal in reply to an external signal.

They are made of silver, copper, bronze, brass, or aluminum waveguides and have elliptical, circular, or rectangular cross-sections. Digital phase shifters use a digital signal that consists of two discrete stages. On the other hand, analog phase shifters utilize an analog signal, mostly voltage, to change a signal's output phase. Normally, RF waveguide phase shifters can alter the phase of an input signal from a minimum of 0° to a maximum of 360°. Variable devices use a variable control signal and are operated mainly in digital products.

The waveguide type segment has been further segmented into rectangular waveguide, circular waveguide, single ridged waveguide, double ridged waveguide, and elliptical waveguide. Among these, the rectangular waveguide segment dominated the overall market, valued at USD 363.7 million and growing at a CAGR of 6.1%. This type of waveguide is a rectangular cross-section with a hollow metal tube. The conducting walls of the rectangular waveguide limit the electromagnetic field, thereby guiding the electromagnetic wave. Rectangular waveguides are used in almost all microwave applications due to their small size.

The waveguide end-user segment has been further segmented into aerospace & defense, medical, industrial, and others. Among these, the others segment dominated the market, accounting for USD 769.7 million in 2021, and it is anticipated to grow at a CAGR of 5.8% during the forecast period. Waveguides are commonly used for communication purposes in spacecraft subsystems, and numerous satellite communication payloads employ Waveguide technology. Due to the rising demand for confined frequency spectrums, the industry is moving toward higher-frequency waveguide systems.

Specialized RF design and innovative, disruptive production techniques are required to manufacture these systems. For instance, in August 2022, U.S. military researchers chose Teledyne Technologies Inc. to develop integration and fabrication technologies for high-performance, compact RF and microwave electronics. This aimed to enable sensing and communication systems at the G-band frequency range between 110 GHz and 300 GHz for telecommunication, remote security sensing, and radio astronomy applications.

The key vendors in the waveguide industry include Penn Engineering Components Inc.; Jupiter Microwave Components Inc.; Quantic Electronics; Cobham Advanced Electronic Solutions; Ducommun Incorporated; Smith's Interconnect; DigiLens, Inc.; Global Invacom; and Flann Microwave Ltd. These companies focus on developing application-specific waveguide solutions for aerospace & defense, healthcare, industrial,

telecommunication, and automotive markets.

The development of radar technology, the rising demand for microwave devices in electronic warfare systems, the increasing satellite launches, and space exploration missions are encouraging waveguide component manufacturers to enter the market and acquire a considerable market share. In December 2022, Fairview Microwave, one of the significant suppliers of microwave, RF, and millimeter-wave devices, launched a series of waveguide frequency multipliers. The multipliers are designed to meet 5G, mobile, satellite communications, test and measurement, R&D, radar systems, and Earth observation applications.

### Waveguide Market Report Highlights

Numerous studies have been conducted on technologies like quantum radars and how they can be used for surveillance. R&D of waveguide components with improved performance protection and capabilities against sophisticated countermeasures are anticipated to be stimulated by the development of advanced radar systems

In radar, a waveguide transfers RF energy to and from the antenna, where the impedance must be matched for effective power transmission. Improvements in radar technologies, which include digital components and software-defined radars, are driving the demand for military radars

There is an increasing demand for technologically advanced warfare systems from the defense forces, propelling the need for waveguide

The phase shifters segment is expected to dominate the overall market and expand at a CAGR of 10.6% from 2022 to 2030

The elliptical waveguide segment is projected to grow at the highest CAGR over the forecast period

The primary source markets for Waveguide are China, the U.S., Japan, India, the U.K., Canada, Germany, France, Brazil, and Mexico. The U.S. will be the primary source market for waveguide companies.

## Contents

### **CHAPTER 1. METHODOLOGY AND SCOPE**

- 1.1. Research Methodology
- 1.2. Research Scope and Assumptions
- 1.3. List of Data Sources
- 1.4. List of Abbreviations

### **CHAPTER 2. EXECUTIVE SUMMARY**

- 2.1. Market Insights
- 2.2. Market Snapshot
- 2.3. Segmental Insights
- 2.4. Waveguide Market Revenue Estimates, 2017 - 2030

### **CHAPTER 3. MARKET VARIABLES, TRENDS, & SCOPE OUTLOOK**

- 3.1. Market Segmentation
- 3.2. Waveguide Market Size & Growth Prospects
- 3.3. Waveguide Market - Value Chain Analysis
- 3.4. Waveguide Market Dynamics
  - 3.4.1. Market Driver Analysis
  - 3.4.2. Market Restraint Analysis
  - 3.4.3. Market Opportunity Analysis
- 3.5. Space Tourism Penetration & Growth Prospects Mapping
- 3.6. Waveguide Market - Porter's Five Forces Analysis
  - 3.6.1. Supplier power
  - 3.6.2. Buyer power
  - 3.6.3. Substitution threat
  - 3.6.4. Threat from new entrant
  - 3.6.5. Competitive rivalry
- 3.7. Waveguide Market - PEST Analysis
  - 3.7.1. Political landscape
  - 3.7.2. Economic landscape
  - 3.7.3. Social landscape
  - 3.7.4. Technology landscape
- 3.8. COVID-19 Impact Analysis

## **CHAPTER 4. WAVEGUIDE MARKET COMPONENT OUTLOOK**

### 4.1. Waveguide Market, By Component Analysis & Market Share, 2021 & 2030

#### 4.2. Adapters

4.2.1. Market estimates and forecasts, 2017 - 2030 (USD Million) (Thousand Units)

4.2.2. Market estimates and forecasts, By Region, 2017 - 2030 (USD Million)

(Thousand Units)

#### 4.3. Couplers

4.3.1. Market estimates and forecasts, 2017 - 2030 (USD Million) (Thousand Units)

4.3.2. Market estimates and forecasts, By Region, 2017 - 2030 (USD Million)

(Thousand Units)

#### 4.4. Loads & Filters

4.4.1. Market estimates and forecasts, 2017 - 2030 (USD Million) (Thousand Units)

4.4.2. Market estimates and forecasts, By Region, 2017 - 2030 (USD Million)

(Thousand Units)

#### 4.5. Isolators & Circulators

4.5.1. Market estimates and forecasts, 2017 - 2030 (USD Million) (Thousand Units)

4.5.2. Market estimates and forecasts, By Region, 2017 - 2030 (USD Million)

(Thousand Units)

#### 4.6. Phase Shifters

4.6.1. Market estimates and forecasts, 2017 - 2030 (USD Million) (Thousand Units)

4.6.2. Market estimates and forecasts, By Region, 2017 - 2030 (USD Million)

(Thousand Units)

#### 4.7. Power Combiners

4.7.1. Market estimates and forecasts, 2017 - 2030 (USD Million) (Thousand Units)

4.7.2. Market estimates and forecasts, By Region, 2017 - 2030 (USD Million)

(Thousand Units)

#### 4.8. Pressure Windows

4.8.1. Market estimates and forecasts, 2017 - 2030 (USD Million) (Thousand Units)

4.8.2. Market estimates and forecasts, By Region, 2017 - 2030 (USD Million)

(Thousand Units)

#### 4.9. Others

4.9.1. Market estimates and forecasts, 2017 - 2030 (USD Million)

4.9.2. Market estimates and forecasts, By Region, 2017 - 2030 (USD Million)

## **CHAPTER 5. WAVEGUIDE MARKET TYPE OUTLOOK**

### 5.1. Waveguide Market, By Type Analysis & Market Share, 2021 & 2030

#### 5.2. Rectangular Waveguide

- 5.2.1. Market estimates and forecasts, 2017 - 2030 (USD Million)
- 5.2.2. Market estimates and forecasts, By Region, 2017 - 2030 (USD Million)
- 5.3. Circular Waveguide
  - 5.3.1. Market estimates and forecasts, 2017 - 2030 (USD Million)
  - 5.3.2. Market estimates and forecasts, By Region, 2017 - 2030 (USD Million)
- 5.4. Single-Ridged Waveguide
  - 5.4.1. Market estimates and forecasts, 2017 - 2030 (USD Million)
  - 5.4.2. Market estimates and forecasts, By Region, 2017 - 2030 (USD Million)
- 5.5. Double-Ridged Waveguide
  - 5.5.1. Market estimates and forecasts, 2017 - 2030 (USD Million)
  - 5.5.2. Market estimates and forecasts, By Region, 2017 - 2030 (USD Million)
- 5.6. Elliptical Waveguide
  - 5.6.1. Market estimates and forecasts, 2017 - 2030 (USD Million)
  - 5.6.2. Market estimates and forecasts, By Region, 2017 - 2030 (USD Million)

## **CHAPTER 6. WAVEGUIDE MARKET END-USER OUTLOOK**

- 6.1. Waveguide Market, By End-user Analysis & Market Share, 2021 & 2030
- 6.2. Aerospace & Defense
  - 6.2.1. Market estimates and forecasts, 2017 - 2030 (USD Million)
  - 6.2.2. Market estimates and forecasts, By Region, 2017 - 2030 (USD Million)
- 6.3. Medical
  - 6.3.1. Market estimates and forecasts, 2017 - 2030 (USD Million)
  - 6.3.2. Market estimates and forecasts, By Region, 2017 - 2030 (USD Million)
- 6.4. Industrial
  - 6.4.1. Market estimates and forecasts, 2017 - 2030 (USD Million)
  - 6.4.2. Market estimates and forecasts, By Region, 2017 - 2030 (USD Million)
- 6.5. Others
  - 6.5.1. Market estimates and forecasts, 2017 - 2030 (USD Million)
  - 6.5.2. Market estimates and forecasts, By Region, 2017 - 2030 (USD Million)

## **CHAPTER 7. WAVEGUIDE MARKET: REGIONAL ESTIMATES & TREND ANALYSIS**

- 7.1. Waveguide Market Share by Region, 2021 & 2030
- 7.2. North America
  - 7.2.1. Market estimates and forecasts, 2017 - 2030
  - 7.2.2. Market estimates and forecasts, By Component, 2017 - 2030 (USD Million)  
(Thousand Units)
  - 7.2.3. Market estimates and forecasts, By Type, 2017 - 2030 (USD Million)



7.2.4. Market estimates and forecasts, By End-user, 2017 - 2030 (USD Million)

7.2.5. U.S.

7.2.5.1. Market estimates and forecasts, By Component, 2017 - 2030 (USD Million)  
(Thousand Units)

7.2.5.2. Market estimates and forecasts, By Type, 2017 - 2030 (USD Million)

7.2.5.3. Market estimates and forecasts, By End-user, 2017 - 2030 (USD Million)

7.2.6. Canada

7.2.6.1. Market estimates and forecasts, By Component, 2017 - 2030 (USD Million)  
(Thousand Units)

7.2.6.2. Market estimates and forecasts, By Type, 2017 - 2030 (USD Million)

7.2.6.3. Market estimates and forecasts, By End-user, 2017 - 2030 (USD Million)

7.3. Europe

7.3.1. Market estimates and forecasts, 2017 - 2030

7.3.2. Market estimates and forecasts, By Component, 2017 - 2030 (USD Million)  
(Thousand Units)

7.3.3. Market estimates and forecasts, By Type, 2017 - 2030 (USD Million)

7.3.4. Market estimates and forecasts, By End-user, 2017 - 2030 (USD Million)

7.3.5. Germany

7.3.5.1. Market estimates and forecasts, By Component, 2017 - 2030 (USD Million)  
(Thousand Units)

7.3.5.2. Market estimates and forecasts, By Type, 2017 - 2030 (USD Million)

7.3.5.3. Market estimates and forecasts, By End-user, 2017 - 2030 (USD Million)

7.3.6. U.K.

7.3.6.1. Market estimates and forecasts, By Component, 2017 - 2030 (USD Million)  
(Thousand Units)

7.3.6.2. Market estimates and forecasts, By Type, 2017 - 2030 (USD Million)

7.3.6.3. Market estimates and forecasts, By End-user, 2017 - 2030 (USD Million)

7.3.7. France

7.3.7.1. Market estimates and forecasts, By Component, 2017 - 2030 (USD Million)  
(Thousand Units)

7.3.7.2. Market estimates and forecasts, By Type, 2017 - 2030 (USD Million)

7.3.7.3. Market estimates and forecasts, By End-user, 2017 - 2030 (USD Million)

7.4. Asia pacific

7.4.1. Market estimates and forecasts, 2017 - 2030

7.4.2. Market estimates and forecasts, By Component, 2017 - 2030 (USD Million)  
(Thousand Units)

7.4.3. Market estimates and forecasts, By Type, 2017 - 2030 (USD Million)

7.4.4. Market estimates and forecasts, By End-user, 2017 - 2030 (USD Million)

7.4.5. China

7.4.5.1. Market estimates and forecasts, By Component, 2017 - 2030 (USD Million)  
(Thousand Units)

7.4.5.2. Market estimates and forecasts, By Type, 2017 - 2030 (USD Million)

7.4.5.3. Market estimates and forecasts, By End-user, 2017 - 2030 (USD Million)

7.4.6. Japan

7.4.6.1. Market estimates and forecasts, By Component, 2017 - 2030 (USD Million)  
(Thousand Units)

7.4.6.2. Market estimates and forecasts, By Type, 2017 - 2030 (USD Million)

7.4.6.3. Market estimates and forecasts, By End-user, 2017 - 2030 (USD Million)

7.4.7. India

7.4.7.1. Market estimates and forecasts, By Component, 2017 - 2030 (USD Million)  
(Thousand Units)

7.4.7.2. Market estimates and forecasts, By Type, 2017 - 2030 (USD Million)

7.4.7.3. Market estimates and forecasts, By End-user, 2017 - 2030 (USD Million)

7.5. Latin America

7.5.1. Market estimates and forecasts, 2017 - 2030

7.5.2. Market estimates and forecasts, By Component, 2017 - 2030 (USD Million)  
(Thousand Units)

7.5.3. Market estimates and forecasts, By Type, 2017 - 2030 (USD Million)

7.5.4. Market estimates and forecasts, By End-user, 2017 - 2030 (USD Million)

7.5.5. Brazil

7.5.5.1. Market estimates and forecasts, By Component, 2017 - 2030 (USD Million)  
(Thousand Units)

7.5.5.2. Market estimates and forecasts, By Type, 2017 - 2030 (USD Million)

7.5.5.3. Market estimates and forecasts, By End-user, 2017 - 2030 (USD Million)

7.5.6. Mexico

7.5.6.1. Market estimates and forecasts, By Component, 2017 - 2030 (USD Million)  
(Thousand Units)

7.5.6.2. Market estimates and forecasts, By Type, 2017 - 2030 (USD Million)

7.5.6.3. Market estimates and forecasts, By End-user, 2017 - 2030 (USD Million)

7.6. Middle East & Africa

7.6.1. Market estimates and forecasts, 2017 - 2030

7.6.2. Market estimates and forecasts, By Component, 2017 - 2030 (USD Million)  
(Thousand Units)

7.6.3. Market estimates and forecasts, By Type, 2017 - 2030 (USD Million)

7.6.4. Market estimates and forecasts, By End-user, 2017 - 2030 (USD Million)

## **CHAPTER 8. COMPETITIVE ANALYSIS**



- 8.1. Recent Developments and Impact Analysis, by Key Market Participants
- 8.2. Company/Competition Categorization (Key Innovators, Market Leaders, Emerging, Niche Players)
- 8.3. Vendor Landscape
  - 8.3.1. Key company market share analysis, 2021
- 8.4. Company Analysis Tools
  - 8.4.1. Market Position Analysis
  - 8.4.2. Competitive Dashboard Analysis

## **CHAPTER 9. COMPETITIVE LANDSCAPE**

- 9.1. Company Profiles
- 9.2. Penn Engineering Components
  - 9.2.1. Company overview
  - 9.2.2. Product benchmarking
- 9.3. Jupiter Microwave Components Inc.
  - 9.3.1. Company overview
  - 9.3.2. Product benchmarking
- 9.4. Quantic Electronics
  - 9.4.1. Company overview
  - 9.4.2. Product benchmarking
  - 9.4.3. Strategic initiatives
- 9.5. Cobham Advanced Electronic Solutions
  - 9.5.1. Company overview
  - 9.5.2. Product benchmarking
  - 9.5.3. Strategic initiatives
- 9.6. Ducommun Incorporated
  - 9.6.1. Company overview
  - 9.6.2. Financial performance
  - 9.6.3. Product benchmarking
  - 9.6.4. Strategic initiatives
- 9.7. Smiths Interconnect
  - 9.7.1. Company overview
  - 9.7.2. Product benchmarking
  - 9.7.3. Strategic initiatives
- 9.8. DigiLens Inc.
  - 9.8.1. Company overview
  - 9.8.2. Product benchmarking
  - 9.8.3. Strategic initiatives

## 9.9. Global Invacom

9.9.1. Company overview

9.9.2. Financial performance

9.9.3. Product benchmarking

## 9.10. Flann Microwave Ltd.

9.10.1. Company overview

9.10.2. Product benchmarking?

## List Of Tables

### LIST OF TABLES

- Table 1 Global Waveguide market revenue, by type, 2017 - 2030 (USD Million)
- Table 2 Global Waveguide market volume, by type, 2017 - 2030 (Thousand Units)
- Table 3 Global Waveguide market revenue, by frequency, 2017 - 2030 (USD Million)
- Table 4 Global Waveguide market volume, by frequency, 2017 - 2030 (Thousand Units)
- Table 5 Global Waveguide market revenue, by end-user, 2017 - 2030 (USD Million)
- Table 6 Global Waveguide market volume, end-user, 2017 - 2030 (Thousand Units)
- Table 7 Waveguide market revenue, by region, 2017 - 2030 (USD Million)
- Table 8 Waveguide market volume, by region, 2017 - 2030 (Thousand Units)
- Table 9 North America Waveguide market revenue, 2017 - 2030 (USD Million)
- Table 10 North America Waveguide market volume, 2017 - 2030 (Thousand Units)
- Table 11 North America Waveguide market revenue, by country, 2017 - 2030 (USD Million)
- Table 12 North America Waveguide market volume, by country, 2017 - 2030 (USD Million)
- Table 13 North America Waveguide market revenue, by type, 2017 - 2030 (USD Million)
- Table 14 North America Waveguide market volume, by type, 2017 - 2030 (USD Million)
- Table 15 North America Waveguide market revenue, by frequency, 2017 - 2030 (USD Million)
- Table 16 North America Waveguide market volume, by frequency, 2017 - 2030 (USD Million)
- Table 17 North America Waveguide market revenue, by end-user, 2017 - 2030 (USD Million)
- Table 18 North America Waveguide market volume, by end-user, 2017 - 2030 (USD Million)
- Table 19 U.S. Waveguide market revenue, 2017 - 2030 (USD Million)
- Table 20 U.S. Waveguide market volume, 2017 - 2030 (Thousand Units)
- Table 21 U.S. Waveguide market revenue, by type, 2017 - 2030 (USD Million)
- Table 22 U.S. Waveguide market volume, by type, 2017 - 2030 (USD Million)
- Table 23 U.S. Waveguide market revenue, by frequency, 2017 - 2030 (USD Million)
- Table 24 U.S. Waveguide market volume, by frequency, 2017 - 2030 (USD Million)
- Table 25 U.S. Waveguide market revenue, by end-user, 2017 - 2030 (USD Million)
- Table 26 U.S. Waveguide market volume, by end-user, 2017 - 2030 (USD Million)
- Table 27 Canada Waveguide market revenue, 2017 - 2030 (USD Million)
- Table 28 Canada Waveguide market volume, 2017 - 2030 (Thousand Units)
- Table 29 Canada Waveguide market revenue, by type, 2017 - 2030 (USD Million)

- Table 30 Canada Waveguide market volume, by type, 2017 - 2030 (USD Million)
- Table 31 Canada Waveguide market revenue, by frequency, 2017 - 2030 (USD Million)
- Table 32 Canada Waveguide market volume, by frequency, 2017 - 2030 (USD Million)
- Table 33 Canada Waveguide market revenue, by end-user, 2017 - 2030 (USD Million)
- Table 34 Canada Waveguide market volume, by end-user, 2017 - 2030 (USD Million)
- Table 35 Europe Waveguide market revenue, 2017 - 2030 (USD Million)
- Table 36 Europe Waveguide market volume, 2017 - 2030 (Thousand Units)
- Table 37 Europe Waveguide market revenue, by country, 2017 - 2030 (USD Million)
- Table 38 Europe Waveguide market volume, by country, 2017 - 2030 (USD Million)
- Table 39 Europe Waveguide market revenue, by type, 2017 - 2030 (USD Million)
- Table 40 Europe Waveguide market volume, by type, 2017 - 2030 (USD Million)
- Table 41 Europe Waveguide market revenue, by frequency, 2017 - 2030 (USD Million)
- Table 42 Europe Waveguide market volume, by frequency, 2017 - 2030 (USD Million)
- Table 43 Europe Waveguide market revenue, by end-user, 2017 - 2030 (USD Million)
- Table 44 Europe Waveguide market volume, by end-user, 2017 - 2030 (USD Million)
- Table 45 U.K. Waveguide market revenue, 2017 - 2030 (USD Million)
- Table 46 U.K. Waveguide market volume, 2017 - 2030 (USD Million)
- Table 47 U.K. Waveguide market revenue, by type, 2017 - 2030 (USD Million)
- Table 48 U.K. Waveguide market volume, by type, 2017 - 2030 (USD Million)
- Table 49 U.K. Waveguide market revenue, by frequency, 2017 - 2030 (USD Million)
- Table 50 U.K. Waveguide market volume, by frequency, 2017 - 2030 (USD Million)
- Table 51 U.K. Waveguide market revenue, by end-user, 2017 - 2030 (USD Million)
- Table 52 U.K. Waveguide market volume, by end-user, 2017 - 2030 (USD Million)
- Table 53 Germany Waveguide market revenue, 2017 - 2030 (USD Million)
- Table 54 Germany Waveguide market volume, 2017 - 2030 (USD Million)
- Table 55 Germany Waveguide market revenue, by type, 2017 - 2030 (USD Million)
- Table 56 Germany Waveguide market volume, by type, 2017 - 2030 (USD Million)
- Table 57 Germany Waveguide market revenue, by frequency, 2017 - 2030 (USD Million)
- Table 58 Germany Waveguide market volume, by frequency, 2017 - 2030 (USD Million)
- Table 59 Germany Waveguide market revenue, by end-user, 2017 - 2030 (USD Million)
- Table 60 Germany Waveguide market volume, by end-user, 2017 - 2030 (USD Million)
- Table 61 France Waveguide market revenue, 2017 - 2030 (USD Million)
- Table 62 France Waveguide market volume, 2017 - 2030 (USD Million)
- Table 63 France Waveguide market revenue, by type, 2017 - 2030 (USD Million)
- Table 64 France Waveguide market volume, by type, 2017 - 2030 (USD Million)
- Table 65 France Waveguide market revenue, by frequency, 2017 - 2030 (USD Million)
- Table 66 France Waveguide market volume, by frequency, 2017 - 2030 (USD Million)
- Table 67 France Waveguide market revenue, by end-user, 2017 - 2030 (USD Million)

- Table 68 France Waveguide market volume, by end-user, 2017 - 2030 (USD Million)
- Table 69 Asia Pacific Waveguide market revenue, 2017 - 2030 (USD Million)
- Table 70 Asia Pacific Waveguide market volume, 2017 - 2030 (Thousand Units)
- Table 71 Asia Pacific Waveguide market revenue, by country, 2017 - 2030 (USD Million)
- Table 72 Asia Pacific Waveguide market volume, by country, 2017 - 2030 (USD Million)
- Table 73 Asia Pacific Waveguide market revenue, by type, 2017 - 2030 (USD Million)
- Table 74 Asia Pacific Waveguide market volume, by type, 2017 - 2030 (USD Million)
- Table 75 Asia Pacific Waveguide market revenue, by frequency, 2017 - 2030 (USD Million)
- Table 76 Asia Pacific Waveguide market volume, by frequency, 2017 - 2030 (USD Million)
- Table 77 Asia Pacific Waveguide market revenue, by end-user, 2017 - 2030 (USD Million)
- Table 78 Asia Pacific Waveguide market volume, by end-user, 2017 - 2030 (USD Million)
- Table 79 China Waveguide market revenue, 2017 - 2030 (USD Million)
- Table 80 China Waveguide market volume, 2017 - 2030 (USD Million)
- Table 81 China Waveguide market revenue, by type, 2017 - 2030 (USD Million)
- Table 82 China Waveguide market volume, by type, 2017 - 2030 (USD Million)
- Table 83 China Waveguide market revenue, by frequency, 2017 - 2030 (USD Million)
- Table 84 China Waveguide market volume, by frequency, 2017 - 2030 (USD Million)
- Table 85 China Waveguide market revenue, by end-user, 2017 - 2030 (USD Million)
- Table 86 China Waveguide market volume, by end-user, 2017 - 2030 (USD Million)
- Table 87 Japan Waveguide market revenue, 2017 - 2030 (USD Million)
- Table 88 Japan Waveguide market volume, 2017 - 2030 (USD Million)
- Table 89 Japan Waveguide market revenue, by type, 2017 - 2030 (USD Million)
- Table 90 Japan Waveguide market volume, by type, 2017 - 2030 (USD Million)
- Table 91 Japan Waveguide market revenue, by frequency, 2017 - 2030 (USD Million)
- Table 92 Japan Waveguide market volume, by frequency, 2017 - 2030 (USD Million)
- Table 93 Japan Waveguide market revenue, by end-user, 2017 - 2030 (USD Million)
- Table 94 Japan Waveguide market volume, by end-user, 2017 - 2030 (USD Million)
- Table 95 India Waveguide market revenue, 2017 - 2030 (USD Million)
- Table 96 India Waveguide market volume, 2017 - 2030 (USD Million)
- Table 97 India Waveguide market revenue, by type, 2017 - 2030 (USD Million)
- Table 98 India Waveguide market volume, by type, 2017 - 2030 (USD Million)
- Table 99 India Waveguide market revenue, by frequency, 2017 - 2030 (USD Million)
- Table 100 India Waveguide market volume, by frequency, 2017 - 2030 (USD Million)
- Table 101 India Waveguide market revenue, by end-user, 2017 - 2030 (USD Million)



Table 102 India Waveguide market volume, by end-user, 2017 - 2030 (USD Million)

Table 103 Latin America Waveguide market revenue, 2017 - 2030 (USD Million)

Table 104 Latin America Waveguide market volume, 2017 - 2030 (Thousand Units)

Table 105 Latin America Waveguide market revenue, by country, 2017 - 2030 (USD Million)

Table 106 Latin America Waveguide market volume, by country, 2017 - 2030 (USD Million)

Table 107 Latin America Waveguide market revenue, by type, 2017 - 2030 (USD Million)

Table 108 Latin America Waveguide market volume, by type, 2017 - 2030 (USD Million)

Table 109 Latin America Waveguide market revenue, by frequency, 2017 - 2030 (USD Million)

Table 110 Latin America Waveguide market volume, by frequency, 2017 - 2030 (USD Million)

Table 111 Latin America Waveguide market revenue, by end-user, 2017 - 2030 (USD Million)

Table 112 Latin America Waveguide market volume, by end-user, 2017 - 2030 (USD Million)

Table 113 Brazil Waveguide market revenue, 2017 - 2030 (USD Million)

Table 114 Brazil Waveguide market volume, 2017 - 2030 (USD Million)

Table 115 Brazil Waveguide market revenue, by type, 2017 - 2030 (USD Million)

Table 116 Brazil Waveguide market volume, by type, 2017 - 2030 (USD Million)

Table 117 Brazil Waveguide market revenue, by frequency, 2017 - 2030 (USD Million)

Table 118 Brazil Waveguide market volume, by frequency, 2017 - 2030 (USD Million)

Table 119 Brazil Waveguide market revenue, by end-user, 2017 - 2030 (USD Million)

Table 120 Brazil Waveguide market volume, by end-user, 2017 - 2030 (USD Million)

Table 121 Mexico Waveguide market revenue, 2017 - 2030 (USD Million)

Table 122 Mexico Waveguide market volume, 2017 - 2030 (USD Million)

Table 123 Mexico Waveguide market revenue, by type, 2017 - 2030 (USD Million)

Table 124 Mexico Waveguide market volume, by type, 2017 - 2030 (USD Million)

Table 125 Mexico Waveguide market revenue, by frequency, 2017 - 2030 (USD Million)

Table 126 Mexico Waveguide market volume, by frequency, 2017 - 2030 (USD Million)

Table 127 Mexico Waveguide market revenue, by end-user, 2017 - 2030 (USD Million)

Table 128 Mexico Waveguide market volume, by end-user, 2017 - 2030 (USD Million)

Table 129 Middle East and Africa Waveguide market revenue, 2017 - 2030 (USD Million)

Table 130 Middle East and Africa Waveguide market volume, 2017 - 2030 (Thousand Units)

Table 131 Middle East and Africa Waveguide market revenue, by type, 2017 - 2030



(USD Million)

Table 132 Middle East and Africa Waveguide market volume, by type, 2017 - 2030

(USD Million)

Table 133 Middle East and Africa Waveguide market revenue, by frequency, 2017 - 2030 (USD Million)

Table 134 Middle East and Africa Waveguide market volume, by frequency, 2017 - 2030 (USD Million)

Table 135 Middle East and Africa Waveguide market revenue, by end-user, 2017 - 2030 (USD Million)

Table 136 Middle East and Africa Waveguide market volume, by end-user, 2017 - 2030 (USD Million)

Table 137 Company categorization?

## List Of Figures

### LIST OF FIGURES

- Fig. 1 Market snapshot - Waveguide market
- Fig. 2 Segment snapshot
- Fig. 3 Competitive landscape snapshot
- Fig. 4 Waveguide market size and growth prospects 2017 - 2030 (Revenue in USD Million)
- Fig. 5 Waveguide market size and growth prospects 2017 - 2030 (Volume in Thousand Units)
- Fig. 6 Value chain analysis - Waveguide market
- Fig. 7 Waveguide market analysis - Market trends
- Fig. 8 Waveguide market - Key market driver impact
- Fig. 9 Waveguide market - Key market restraint impact
- Fig. 10 Waveguide market - Key market opportunity impact
- Fig. 11 Waveguide market - Porter's five forces analysis
- Fig. 12 Waveguide market - PEST analysis
- Fig. 13 Waveguide market - Type movement analysis
- Fig. 14 Waveguide market, Type revenue movement analysis, 2021 & 2030
- Fig. 15 Waveguide market - Frequency movement analysis
- Fig. 16 Waveguide market, Frequency revenue movement analysis, 2021 & 2030
- Fig. 17 Waveguide market - End-user movement analysis
- Fig. 18 Waveguide market, End-user revenue movement analysis, 2021 & 2030
- Fig. 19 North America Waveguide market - Regional movement analysis
- Fig. 20 Europe America Waveguide market - Regional movement analysis
- Fig. 21 Asia Pacific Waveguide market - Regional movement analysis
- Fig. 22 Latin America Waveguide market - Regional movement analysis
- Fig. 23 Middle East and Africa Waveguide market - Regional movement analysis
- Fig. 24 Waveguide market - Key company market share analysis, 2021
- Fig. 25 Waveguide market - Market position analysis
- Fig. 26 Waveguide market - Competitive dashboard analysis

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