

Millimeter Wave Technology Market Report by Component (Antennas and Transceivers, Amplifiers, Oscillators, Control Devices, Frequency Converters, Passive Components, and Others), Product (Telecommunication Equipment, Imaging and Scanning Systems, Radar and Satellite Communication Systems, Services), Frequency Band (30 GHz - 57 GHz, 57 GHz - 96 GHz, 96 GHz -300 GHz), License Type (Light Licensed Frequency Millimeter Wave, Unlicensed Frequency Millimeter Wave, Fully Licensed Frequency Millimeter Wave), Application (Telecommunication, Military and Defense, Automotive and Transport, Healthcare, Electronics and Semiconductor, and Others), and Region 2024-2032

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Abstracts

The global millimeter wave technology market size reached US\$ 2.6 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 12.5 Billion by 2032, exhibiting a growth rate (CAGR) of 18.5% during 2024-2032. The global millimeter wave technology market is experiencing significant growth driven by the increasing demand for high-speed data transfer, the adoption of 5G technology, and the need for advanced imaging and scanning solutions.

Millimeter wave technology, also referred to as extremely high frequency (EHF) technology, involves the transmission of data through radio waves with wavelengths that fall in the range between 1mm and 10mm, or equivalently, frequencies between 30GHz and 300GHz. It utilizes short wavelengths, enabling high-speed data transmission and enhanced communication performance. With its large bandwidth and high-frequency spectrum, millimeter wave technology facilitates faster internet speeds, enabling the seamless transfer of massive data volumes. Moreover, it supports the development of advanced wireless communication systems, such as 5G networks, which provide low latency and high-capacity connectivity. The advantages of millimeter wave technology also extend to applications like autonomous vehicles, augmented reality, and smart city infrastructure. Furthermore, this technology comes in two types: passive and active. Passive millimeter wave systems detect naturally occurring radiation, while active systems employ a transmitter and receiver to generate and receive millimeter wave signals.

The global millimeter wave technology market is bolstered by a multitude of factors, including the growing demand for high-speed data transfer and the increasing adoption of 5G technology. Additionally, the rising need for high-resolution imaging and scanning technologies in various industries, including healthcare, aerospace, and defense, is boosting the demand for millimeter wave technology. Furthermore, the proliferation of the Internet of Things (IoT) devices and the need for seamless connectivity are fueling the market growth. Moreover, the increasing deployment of millimeter wave technology in backhaul networks to support the growing data traffic is another significant driver. The surging awareness regarding the technology's ability to provide efficient and cost-effective wireless backhaul solutions and the advancements in semiconductor and communication technologies are favoring the market growth.

Millimeter Wave Technology Market Trends/Drivers:

Growing demand for high-speed data transfer and the increasing adoption of 5G

As the demand for faster data transmission rates rises, millimeter wave spectrum offers the advantage of higher bandwidth, making it an ideal solution for applications like autonomous vehicles, virtual reality, and high-definition video streaming. The need for seamless connectivity and the proliferation of IoT devices further fuel the demand for millimeter wave technology, enabling efficient and reliable communication between devices. With 5G deployment gaining momentum worldwide, the market for millimeter wave technology is set to experience substantial growth.

Rising need for high-resolution imaging and scanning technologies in various industries

The surging demand for high-resolution imaging and scanning technologies in various industries, including healthcare, aerospace, and defense, is a significant driver for the global millimeter wave technology market. Millimeter wave technology enables precise and detailed imaging, making it valuable for medical diagnostic tools, security screening devices, and aerospace applications. The ability to capture high-quality images and provide accurate scanning capabilities in real-time is crucial for enhancing safety, security, and operational efficiency in these industries. Consequently, the demand for millimeter wave technology is increasing as organizations seek advanced imaging and scanning solutions for various critical applications.

Increasing deployment of millimeter wave technology in backhaul networks

The increasing deployment of millimeter wave technology in backhaul networks to support the growing data traffic is a significant driver for the global market. With the exponential growth in data consumption and the demand for higher data speeds, traditional wireless networks face challenges in meeting these requirements. Millimeter wave technology offers a viable solution by providing high-bandwidth wireless backhaul connections, enabling efficient data transfer between base stations and core networks. Telecom operators worldwide are adopting millimeter wave technology to address the capacity and performance needs of their networks, paving the way for substantial market growth.

Millimeter Wave Technology Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global millimeter wave technology market report, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on component, product, frequency band, license type and application.

Breakup by Component:

Antennas and Transceivers

Amplifiers

Oscillators

Control Devices

Frequency Converters

Passive Components

Others

Antennas and transceivers dominate the market

The report has provided a detailed breakup and analysis of the market based on the component. This includes antennas and transceivers, amplifiers, oscillators, control devices, frequency converters, passive components, and others. According to the report, antennas and transceivers represented the largest segment.

Antennas and transceivers play a crucial role in millimeter wave technology, and their market dominance can be attributed to several factors. With the escalating demand for high-speed data transmission, there's a burgeoning need for antennas and transceivers capable of operating in the high frequency, high data rate millimeter wave spectrum. They are fundamental in enabling 5G networks, which promise superior speed and lower latency. Transceivers facilitate the conversion of these high frequency signals into a format usable by electronic devices, while antennas are essential for signal transmission and reception over these higher frequencies. Furthermore, millimeter wave technology requires a dense network of antennas due to its shorter range and susceptibility to interference, increasing the demand for these components. In other applications, such as security scanning, radar systems, and remote sensing, high-resolution capabilities offered by millimeter wave technology are also driving the need for specialized antennas and transceivers, thereby leading the market.

Breakup by Product:

Telecommunication Equipment

Imaging and Scanning Systems

Radar and Satellite Communication Systems

Services

Telecommunication equipment hold the largest share in the market

A detailed breakup and analysis of the market based on the product has also been provided in the report. This includes telecommunication equipment, imaging and scanning systems, radar and satellite communication systems, and services. According to the report, telecommunication equipment accounted for the largest market share.

Telecommunication equipment is leading the millimeter wave technology market due to the surging demand for high-speed, high-capacity wireless communication. The transition to 5G networks heavily relies on millimeter wave technology to deliver unprecedented speed and lower latency, boosting the need for compatible telecommunication equipment. Millimeter wave technology allows for significantly higher data rates and more simultaneous connections compared to previous generations of mobile networks. This is particularly critical for supporting the growth of IoT, streaming services, virtual and augmented reality, and other data-intensive applications. Moreover, the smaller wavelength of millimeter waves enables more compact antenna design and the deployment of massive MIMO (multiple-input, multiple-output) technology, which uses multiple antennas to improve communication performance.

Breakup by Frequency Band:

30 GHz - 57 GHz

57 GHz - 96 GHz

96 GHz -300 GHz

57 GHz - 96 GHz dominate the market

The report has provided a detailed breakup and analysis of the market based on the frequency band. This includes 30 GHz - 57 GHz, 57 GHz - 96 GHz, and 96 GHz -300 GHz. According to the report, 57 GHz - 96 GHz represented the largest segment.

The frequency band between 57 GHz and 96 GHz is leading the millimeter wave technology market due to several key factors. This range, also known as the E-band, offers abundant unlicensed or lightly licensed spectrum, providing a cost-effective

solution for wireless communication services. Additionally, the higher frequencies allow for more bandwidth, which translates into faster data rates and higher capacity, critical for high-speed applications such as 5G networks and high-performance computing. These frequencies are particularly beneficial for supporting data-intensive applications like video streaming, virtual reality, and IoT devices. Moreover, these frequencies allow for smaller antenna sizes, leading to more compact and dense network infrastructure, essential for urban areas and indoor usage. Lastly, the signal's shorter range in this frequency band enhances security as it's harder to intercept.

Breakup by License Type:

Light Licensed Frequency Millimeter Wave

Unlicensed Frequency Millimeter Wave

Fully Licensed Frequency Millimeter Wave

Fully licensed frequency millimeter wave hold the largest share in the market

A detailed breakup and analysis of the market based on the license type has also been provided in the report. This includes light licensed, unlicensed, and fully licensed frequency millimeter wave. According to the report, fully licensed frequency millimeter wave accounted for the largest market share.

Fully licensed frequency millimeter wave involves the allocation of specific frequency bands within the millimeter wave spectrum through an official licensing process. This approach ensures exclusive access to the allocated spectrum, providing a high degree of control and protection against interference. Fully licensed frequency millimeter wave is often utilized by telecommunications operators for deploying 5G networks and other mission-critical applications. It allows for efficient spectrum management, ensures quality of service, and enables seamless integration with existing cellular infrastructure.

Breakup by Application:

Telecommunication

Military and Defense

Automotive and Transport

Healthcare

Electronics and Semiconductor

Others

Telecommunication dominates the market

The report has provided a detailed breakup and analysis of the market based on the application. This includes telecommunication, military and defense, automotive and transport, healthcare, electronics and semiconductor, and others. According to the report, telecommunication represented the largest segment.

Telecommunication is the largest application of millimeter wave technology due to the escalating demand for high-speed, high-capacity data transmission. Millimeter waves, with their high frequencies, enable faster data rates and higher bandwidth, making them ideal for wireless communication services. The advent of 5G networks, which extensively utilizes millimeter wave frequencies, further accentuates this demand. The shorter wavelengths of millimeter waves also allow the use of smaller antennas, enabling dense, urban deployments and massive MIMO configurations, enhancing network capacity and performance. Moreover, millimeter wave technology can alleviate congestion in lower frequency bands, providing a solution for the growing number of wireless devices and data-intensive applications like video streaming, IoT, and augmented or virtual reality. Despite challenges such as shorter range and susceptibility to environmental interference, the benefits of millimeter wave technology in improving telecommunication services continue to fuel its application in this sector.

Breakup by Region:

North America

United States

Canada

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

North America exhibits a clear dominance, accounting for the largest millimeter wave technology market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and Others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and Others); Latin America (Brazil, Mexico, and Others); and the Middle East and Africa. According to the report, North America accounted for the largest market share.

North America is leading the millimeter wave technology market due to a combination of technological advancements, early adoption, and regulatory support. The region is home to several tech giants and telecommunication companies that are at the forefront of researching and implementing new technologies, including 5G, which relies heavily on millimeter wave technology. Furthermore, the Federal Communications Commission (FCC) in the United States has made significant amounts of millimeter wave spectrum available for licensed and unlicensed use, fostering innovation and deployment in this space. The presence of a robust infrastructure for developing and deploying advanced telecommunications services, combined with a strong emphasis on IoT and smart city initiatives, also contributes to North America's dominance in the millimeter wave technology market.

Competitive Landscape:

The global millimeter wave technology market is highly competitive, with several key players competing for market share. These players focus on research and development activities to enhance the capabilities of millimeter wave technology and introduce innovative products. The market is characterized by strategic partnerships, collaborations, and acquisitions, as companies aim to strengthen their market position and expand their product portfolios. Additionally, players strive to establish strong distribution networks and engage in marketing activities to increase their customer base. As the market grows, competition intensifies, driving companies to differentiate themselves through technological advancements, quality, pricing strategies, and customer service. The competitive landscape is dynamic, with players constantly seeking opportunities in emerging regions and industry verticals.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Aviat Networks Inc.

AXXCSS Wireless Solutions Inc.

Farran Technology Ltd.

Fastback Networks Inc.

Keysight Technologies Inc.

L3 Technologies Inc.

Millimeter Wave Products Inc.

Mistral Solutions Pvt. Ltd. (AXISCADES Engineering Technologies Ltd.)

NEC Corporation

Siklu Communication Ltd.

Smiths Group Plc

Vubiq Networks Inc.

Recent Developments:

In July 2023, NEC Corporation developed generative artificial intelligence (AI) that is customizable for each customer in order to create new value for companies in response to business changes caused by new technologies.

In June 2023, Aviat Networks, Inc. announced a new 11 GHz indoor microwave radio with the highest transmitter power ever supported in the industry, to allow more capacity, longer links and provide operators with an alternative to deploy long distance links without the potential risk of interference in the 6 GHz band.

In June 2023, The U.S. Space Force Space Systems Command awarded L3Harris Technologies approximately \$29 million for a sensor payload design contract to deliver a digital model for the medium Earth orbit (MEO) – Missile Track Custody (MTC) Epoch 1 program that will support detecting and tracking hypersonic missiles.

Key Questions Answered in This Report

1. What was the size of the global millimeter wave technology market in 2023?
2. What is the expected growth rate of the global millimeter wave technology market during 2024-2032?
3. What has been the impact of COVID-19 on the global millimeter wave technology market?
4. What are the key factors driving the global millimeter wave technology market?
5. What is the breakup of the global millimeter wave technology market based on the component?
6. What is the breakup of the global millimeter wave technology market based on the product?
7. What is the breakup of the global millimeter wave technology market based on the frequency band?
8. What is the breakup of the global millimeter wave technology market based on the license type?
9. What is the breakup of the global millimeter wave technology market based on the application?
10. What are the key regions in the global millimeter wave technology market?
11. Who are the key players/companies in the global millimeter wave technology market?

Contents

1 PREFACE

2 SCOPE AND METHODOLOGY

- 2.1 Objectives of the Study
- 2.2 Stakeholders
- 2.3 Data Sources
 - 2.3.1 Primary Sources
 - 2.3.2 Secondary Sources
- 2.4 Market Estimation
 - 2.4.1 Bottom-Up Approach
 - 2.4.2 Top-Down Approach
- 2.5 Forecasting Methodology

3 EXECUTIVE SUMMARY

4 INTRODUCTION

- 4.1 Overview
- 4.2 Key Industry Trends

5 GLOBAL MILLIMETER WAVE TECHNOLOGY MARKET

- 5.1 Market Overview
- 5.2 Market Performance
- 5.3 Impact of COVID-19
- 5.4 Market Forecast

6 MARKET BREAKUP BY COMPONENT

- 6.1 Antennas and Transceivers
 - 6.1.1 Market Trends
 - 6.1.2 Market Forecast
- 6.2 Amplifiers
 - 6.2.1 Market Trends
 - 6.2.2 Market Forecast
- 6.3 Oscillators

- 6.3.1 Market Trends
- 6.3.2 Market Forecast
- 6.4 Control Devices
 - 6.4.1 Market Trends
 - 6.4.2 Market Forecast
- 6.5 Frequency Converters
 - 6.5.1 Market Trends
 - 6.5.2 Market Forecast
- 6.6 Passive Components
 - 6.6.1 Market Trends
 - 6.6.2 Market Forecast
- 6.7 Others
 - 6.7.1 Market Trends
 - 6.7.2 Market Forecast

7 MARKET BREAKUP BY PRODUCT

- 7.1 Telecommunication Equipment
 - 7.1.1 Market Trends
 - 7.1.2 Market Forecast
- 7.2 Imaging and Scanning Systems
 - 7.2.1 Market Trends
 - 7.2.2 Market Forecast
- 7.3 Radar and Satellite Communication Systems
 - 7.3.1 Market Trends
 - 7.3.2 Market Forecast
- 7.4 Services
 - 7.4.1 Market Trends
 - 7.4.2 Market Forecast

8 MARKET BREAKUP BY FREQUENCY BAND

- 8.1 30 GHz - 57 GHz
 - 8.1.1 Market Trends
 - 8.1.2 Market Forecast
- 8.2 57 GHz - 96 GHz
 - 8.2.1 Market Trends
 - 8.2.2 Market Forecast
- 8.3 96 GHz -300 GHz

8.3.1 Market Trends

8.3.2 Market Forecast

9 MARKET BREAKUP BY LICENSE TYPE

9.1 Light Licensed Frequency Millimeter Wave

9.1.1 Market Trends

9.1.2 Market Forecast

9.2 Unlicensed Frequency Millimeter Wave

9.2.1 Market Trends

9.2.2 Market Forecast

9.3 Fully Licensed Frequency Millimeter Wave

9.3.1 Market Trends

9.3.2 Market Forecast

10 MARKET BREAKUP BY APPLICATION

10.1 Telecommunication

10.1.1 Market Trends

10.1.2 Market Forecast

10.2 Military and Defense

10.2.1 Market Trends

10.2.2 Market Forecast

10.3 Automotive and Transport

10.3.1 Market Trends

10.3.2 Market Forecast

10.4 Healthcare

10.4.1 Market Trends

10.4.2 Market Forecast

10.5 Electronics and Semiconductor

10.5.1 Market Trends

10.5.2 Market Forecast

10.6 Others

10.6.1 Market Trends

10.6.2 Market Forecast

11 MARKET BREAKUP BY REGION

11.1 North America

- 11.1.1 United States
 - 11.1.1.1 Market Trends
 - 11.1.1.2 Market Forecast
- 11.1.2 Canada
 - 11.1.2.1 Market Trends
 - 11.1.2.2 Market Forecast
- 11.2 Asia Pacific
 - 11.2.1 China
 - 11.2.1.1 Market Trends
 - 11.2.1.2 Market Forecast
 - 11.2.2 Japan
 - 11.2.2.1 Market Trends
 - 11.2.2.2 Market Forecast
 - 11.2.3 India
 - 11.2.3.1 Market Trends
 - 11.2.3.2 Market Forecast
 - 11.2.4 South Korea
 - 11.2.4.1 Market Trends
 - 11.2.4.2 Market Forecast
 - 11.2.5 Australia
 - 11.2.5.1 Market Trends
 - 11.2.5.2 Market Forecast
 - 11.2.6 Indonesia
 - 11.2.6.1 Market Trends
 - 11.2.6.2 Market Forecast
 - 11.2.7 Others
 - 11.2.7.1 Market Trends
 - 11.2.7.2 Market Forecast
- 11.3 Europe
 - 11.3.1 Germany
 - 11.3.1.1 Market Trends
 - 11.3.1.2 Market Forecast
 - 11.3.2 France
 - 11.3.2.1 Market Trends
 - 11.3.2.2 Market Forecast
 - 11.3.3 United Kingdom
 - 11.3.3.1 Market Trends
 - 11.3.3.2 Market Forecast
 - 11.3.4 Italy

- 11.3.4.1 Market Trends
- 11.3.4.2 Market Forecast
- 11.3.5 Spain
 - 11.3.5.1 Market Trends
 - 11.3.5.2 Market Forecast
- 11.3.6 Russia
 - 11.3.6.1 Market Trends
 - 11.3.6.2 Market Forecast
- 11.3.7 Others
 - 11.3.7.1 Market Trends
 - 11.3.7.2 Market Forecast
- 11.4 Latin America
 - 11.4.1 Brazil
 - 11.4.1.1 Market Trends
 - 11.4.1.2 Market Forecast
 - 11.4.2 Mexico
 - 11.4.2.1 Market Trends
 - 11.4.2.2 Market Forecast
 - 11.4.3 Others
 - 11.4.3.1 Market Trends
 - 11.4.3.2 Market Forecast
- 11.5 Middle East and Africa
 - 11.5.1 Market Trends
 - 11.5.2 Market Breakup by Country
 - 11.5.3 Market Forecast

12 SWOT ANALYSIS

- 12.1 Overview
- 12.2 Strengths
- 12.3 Weaknesses
- 12.4 Opportunities
- 12.5 Threats

13 VALUE CHAIN ANALYSIS

14 PORTERS FIVE FORCES ANALYSIS

- 14.1 Overview

- 14.2 Bargaining Power of Buyers
- 14.3 Bargaining Power of Suppliers
- 14.4 Degree of Competition
- 14.5 Threat of New Entrants
- 14.6 Threat of Substitutes

15 PRICE ANALYSIS

16 COMPETITIVE LANDSCAPE

- 16.1 Market Structure
- 16.2 Key Players
- 16.3 Profiles of Key Players
 - 16.3.1 Aviat Networks Inc.
 - 16.3.1.1 Company Overview
 - 16.3.1.2 Product Portfolio
 - 16.3.1.3 Financials
 - 16.3.2 AXXCSS Wireless Solutions Inc.
 - 16.3.2.1 Company Overview
 - 16.3.2.2 Product Portfolio
 - 16.3.3 Farran Technology Ltd.
 - 16.3.3.1 Company Overview
 - 16.3.3.2 Product Portfolio
 - 16.3.3.3 Financials
 - 16.3.4 Fastback Networks Inc
 - 16.3.4.1 Company Overview
 - 16.3.4.2 Product Portfolio
 - 16.3.5 Keysight Technologies Inc.
 - 16.3.5.1 Company Overview
 - 16.3.5.2 Product Portfolio
 - 16.3.5.3 Financials
 - 16.3.5.4 SWOT Analysis
 - 16.3.6 L3 Technologies Inc.
 - 16.3.6.1 Company Overview
 - 16.3.6.2 Product Portfolio
 - 16.3.6.3 SWOT Analysis
 - 16.3.7 Millimeter Wave Products Inc.
 - 16.3.7.1 Company Overview
 - 16.3.7.2 Product Portfolio

16.3.8 Mistral Solutions Pvt. Ltd. (AXISCADES Engineering Technologies Ltd.)

16.3.8.1 Company Overview

16.3.8.2 Product Portfolio

16.3.9 NEC Corporation

16.3.9.1 Company Overview

16.3.9.2 Product Portfolio

16.3.9.3 Financials

16.3.9.4 SWOT Analysis

16.3.10 Siklu Communication Ltd.

16.3.10.1 Company Overview

16.3.10.2 Product Portfolio

16.3.11 Smiths Group plc

16.3.11.1 Company Overview

16.3.11.2 Product Portfolio

16.3.11.3 Financials

16.3.11.4 SWOT Analysis

16.3.12 Vubiq Networks Inc.

16.3.12.1 Company Overview

16.3.12.2 Product Portfolio

List Of Tables

LIST OF TABLES

Table 1: Global: Millimeter Wave Technology Market: Key Industry Highlights, 2023 and 2032

Table 2: Global: Millimeter Wave Technology Market Forecast: Breakup by Component (in Million US\$), 2024-2032

Table 3: Global: Millimeter Wave Technology Market Forecast: Breakup by Product (in Million US\$), 2024-2032

Table 4: Global: Millimeter Wave Technology Market Forecast: Breakup by Frequency Band (in Million US\$), 2024-2032

Table 5: Global: Millimeter Wave Technology Market Forecast: Breakup by License Type (in Million US\$), 2024-2032

Table 6: Global: Millimeter Wave Technology Market Forecast: Breakup by Application (in Million US\$), 2024-2032

Table 7: Global: Millimeter Wave Technology Market Forecast: Breakup by Region (in Million US\$), 2024-2032

Table 8: Global: Millimeter Wave Technology Market Structure

Table 9: Global: Millimeter Wave Technology Market: Key Players

List Of Figures

LIST OF FIGURES

Figure 1: Global: Millimeter Wave Technology Market: Major Drivers and Challenges

Figure 2: Global: Millimeter Wave Technology Market: Sales Value (in Billion US\$), 2018-2023

Figure 3: Global: Millimeter Wave Technology Market: Breakup by Component (in %), 2023

Figure 4: Global: Millimeter Wave Technology Market: Breakup by Product (in %), 2023

Figure 5: Global: Millimeter Wave Technology Market: Breakup by Frequency Band (in %), 2023

Figure 6: Global: Millimeter Wave Technology Market: Breakup by License Type (in %), 2023

Figure 7: Global: Millimeter Wave Technology Market: Breakup by Application (in %), 2023

Figure 8: Global: Millimeter Wave Technology Market: Breakup by Region (in %), 2023

Figure 9: Global: Millimeter Wave Technology Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 10: Global: Millimeter Wave Technology (Antennas and Transceivers) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 11: Global: Millimeter Wave Technology (Antennas and Transceivers) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 12: Global: Millimeter Wave Technology (Amplifiers) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 13: Global: Millimeter Wave Technology (Amplifiers) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 14: Global: Millimeter Wave Technology (Oscillators) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 15: Global: Millimeter Wave Technology (Oscillators) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 16: Global: Millimeter Wave Technology (Control Devices) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 17: Global: Millimeter Wave Technology (Control Devices) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 18: Global: Millimeter Wave Technology (Frequency Converters) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 19: Global: Millimeter Wave Technology (Frequency Converters) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 20: Global: Millimeter Wave Technology (Passive Components) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 21: Global: Millimeter Wave Technology (Passive Components) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 22: Global: Millimeter Wave Technology (Other Components) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 23: Global: Millimeter Wave Technology (Other Components) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 24: Global: Millimeter Wave Technology (Telecommunication Equipment) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 25: Global: Millimeter Wave Technology (Telecommunication Equipment) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 26: Global: Millimeter Wave Technology (Imaging and Scanning Systems) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 27: Global: Millimeter Wave Technology (Imaging and Scanning Systems) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 28: Global: Millimeter Wave Technology (Radar and Satellite Communication Systems) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 29: Global: Millimeter Wave Technology (Radar and Satellite Communication Systems) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 30: Global: Millimeter Wave Technology (Services) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 31: Global: Millimeter Wave Technology (Services) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 32: Global: Millimeter Wave Technology (30 GHz - 57 GHz) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 33: Global: Millimeter Wave Technology (30 GHz - 57 GHz) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 34: Global: Millimeter Wave Technology (57 GHz - 96 GHz) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 35: Global: Millimeter Wave Technology (57 GHz - 96 GHz) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 36: Global: Millimeter Wave Technology (96 GHz -300 GHz) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 37: Global: Millimeter Wave Technology (96 GHz -300 GHz) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 38: Global: Millimeter Wave Technology (Light Licensed Frequency Millimeter Wave) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 39: Global: Millimeter Wave Technology (Light Licensed Frequency Millimeter

Wave) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 40: Global: Millimeter Wave Technology (Unlicensed Frequency Millimeter Wave) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 41: Global: Millimeter Wave Technology (Unlicensed Frequency Millimeter Wave) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 42: Global: Millimeter Wave Technology (Fully Licensed Frequency Millimeter Wave) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 43: Global: Millimeter Wave Technology (Fully Licensed Frequency Millimeter Wave) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 44: Global: Millimeter Wave Technology (Telecommunication) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 45: Global: Millimeter Wave Technology (Telecommunication) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 46: Global: Millimeter Wave Technology (Military and Defense) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 47: Global: Millimeter Wave Technology (Military and Defense) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 48: Global: Millimeter Wave Technology (Automotive and Transport) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 49: Global: Millimeter Wave Technology (Automotive and Transport) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 50: Global: Millimeter Wave Technology (Healthcare) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 51: Global: Millimeter Wave Technology (Healthcare) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 52: Global: Millimeter Wave Technology (Electronics and Semiconductor) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 53: Global: Millimeter Wave Technology (Electronics and Semiconductor) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 54: Global: Millimeter Wave Technology (Other Applications) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 55: Global: Millimeter Wave Technology (Other Applications) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 56: North America: Millimeter Wave Technology Market: Sales Value (in Million US\$), 2018 & 2023

Figure 57: North America: Millimeter Wave Technology Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 58: United States: Millimeter Wave Technology Market: Sales Value (in Million US\$), 2018 & 2023

Figure 59: United States: Millimeter Wave Technology Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 60: Canada: Millimeter Wave Technology Market: Sales Value (in Million US\$), 2018 & 2023

Figure 61: Canada: Millimeter Wave Technology Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 62: Asia Pacific: Millimeter Wave Technology Market: Sales Value (in Million US\$), 2018 & 2023

Figure 63: Asia Pacific: Millimeter Wave Technology Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 64: China: Millimeter Wave Technology Market: Sales Value (in Million US\$), 2018 & 2023

Figure 65: China: Millimeter Wave Technology Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 66: Japan: Millimeter Wave Technology Market: Sales Value (in Million US\$), 2018 & 2023

Figure 67: Japan: Millimeter Wave Technology Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 68: India: Millimeter Wave Technology Market: Sales Value (in Million US\$), 2018 & 2023

Figure 69: India: Millimeter Wave Technology Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 70: South Korea: Millimeter Wave Technology Market: Sales Value (in Million US\$), 2018 & 2023

Figure 71: South Korea: Millimeter Wave Technology Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 72: Australia: Millimeter Wave Technology Market: Sales Value (in Million US\$), 2018 & 2023

Figure 73: Australia: Millimeter Wave Technology Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 74: Indonesia: Millimeter Wave Technology Market: Sales Value (in Million US\$), 2018 & 2023

Figure 75: Indonesia: Millimeter Wave Technology Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 76: Others: Millimeter Wave Technology Market: Sales Value (in Million US\$), 2018 & 2023

Figure 77: Others: Millimeter Wave Technology Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 78: Europe: Millimeter Wave Technology Market: Sales Value (in Million US\$),

2018 & 2023

Figure 79: Europe: Millimeter Wave Technology Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 80: Germany: Millimeter Wave Technology Market: Sales Value (in Million US\$), 2018 & 2023

Figure 81: Germany: Millimeter Wave Technology Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 82: France: Millimeter Wave Technology Market: Sales Value (in Million US\$), 2018 & 2023

Figure 83: France: Millimeter Wave Technology Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 84: United Kingdom: Millimeter Wave Technology Market: Sales Value (in Million US\$), 2018 & 2023

Figure 85: United Kingdom: Millimeter Wave Technology Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 86: Italy: Millimeter Wave Technology Market: Sales Value (in Million US\$), 2018 & 2023

Figure 87: Italy: Millimeter Wave Technology Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 88: Spain: Millimeter Wave Technology Market: Sales Value (in Million US\$), 2018 & 2023

Figure 89: Spain: Millimeter Wave Technology Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 90: Russia: Millimeter Wave Technology Market: Sales Value (in Million US\$), 2018 & 2023

Figure 91: Russia: Millimeter Wave Technology Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 92: Others: Millimeter Wave Technology Market: Sales Value (in Million US\$), 2018 & 2023

Figure 93: Others: Millimeter Wave Technology Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 94: Latin America: Millimeter Wave Technology Market: Sales Value (in Million US\$), 2018 & 2023

Figure 95: Latin America: Millimeter Wave Technology Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 96: Brazil: Millimeter Wave Technology Market: Sales Value (in Million US\$), 2018 & 2023

Figure 97: Brazil: Millimeter Wave Technology Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 98: Mexico: Millimeter Wave Technology Market: Sales Value (in Million US\$), 2018 & 2023

Figure 99: Mexico: Millimeter Wave Technology Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 100: Others: Millimeter Wave Technology Market: Sales Value (in Million US\$), 2018 & 2023

Figure 101: Others: Millimeter Wave Technology Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 102: Middle East and Africa: Millimeter Wave Technology Market: Sales Value (in Million US\$), 2018 & 2023

Figure 103: Middle East and Africa: Millimeter Wave Technology Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 104: Global: Millimeter Wave Technology Industry: SWOT Analysis

Figure 105: Global: Millimeter Wave Technology Industry: Value Chain Analysis

Figure 106: Global: Millimeter Wave Technology Industry: Porter's Five Forces Analysis

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