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Global High-Frequency Magnetic Components for SSTs Market Growth 2026-2032

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Abstracts

The global High-Frequency Magnetic Components for SSTs market size is predicted to grow from US$ 46.96 million in 2025 to US$ 134 million in 2032; it is expected to grow at a CAGR of 16.1% from 2026 to 2032.

High-frequency magnetic components for solid-state transformers (SSTs) are custom magnetic devices installed in the SST power-conversion chain to provide galvanic isolation, energy transfer, resonance, energy storage, and filtering at switching frequencies ranging from several kilohertz to hundreds of kilohertz. Major product forms include medium-/high-frequency isolation transformers, resonant inductors, filter inductors, auxiliary transformers, and integrated magnetics. These components are typically designed for DAB, LLC, and modular power-conversion stages. Key procurement specifications include rated power, operating frequency, insulation withstand voltage, partial-discharge performance, leakage inductance, core and winding losses, temperature rise, and power density. Ferrite, nanocrystalline, and amorphous soft-magnetic materials are commonly used. Major downstream SST systems include AI data centers, EV charging infrastructure, renewable energy, battery storage, and grid applications. Products are generally highly customized and frequently co-developed with system OEMs. The market-level blended gross margin is estimated at about 35%.

Market Trends

SST magnetics are moving from conventional wound components toward higher switching frequency, higher insulation voltage, greater power density, and tighter system-level co-design. As wide-bandgap devices such as SiC raise switching frequencies, core loss, winding skin and proximity effects, parasitic capacitance, and insulation electric-field distribution become simultaneous design constraints. This is

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accelerating adoption of sectionalized windings, litz-wire or copper-foil conductors, planar structures, low-capacitance designs, and more sophisticated air, cold-plate, or liquid-cooling interfaces. Parameter coordination between the main transformer and resonant inductors is also becoming more important, while integrated magnetics can reduce component count and increase power density in selected modular DAB and resonant architectures.

Drivers

Demand for high-density AI data-center power architectures, higher-power fast-charging infrastructure, bidirectional power flow in solar-plus-storage systems, and digital grid modernization is expanding the commercial use cases for SSTs. High-frequency isolation allows SSTs to connect directly to medium-voltage systems while coordinating with DC buses, energy storage, and distributed energy resources, creating incremental demand for medium-/high-frequency isolation transformers, reactors, and auxiliary magnetic components.

Restraints

High-frequency SST magnetics remain highly customized. Differences in converter topology, bus voltage, power-module count, cooling method, and insulation architecture can materially change the magnetic circuit and winding design. The cost of high-voltage insulation systems, nanocrystalline cores, copper, and high-frequency conductors, combined with partial-discharge, temperature-rise, dielectric, and lifetime validation, extends the development cycle from prototype to production and limits near-term economies of scale.

Opportunities

Next-generation SST platforms for 800 VDC data centers, megawatt charging, modular energy storage, and medium-voltage DC microgrids are creating new design windows for high-power-density MFTs and integrated magnetics. Suppliers that can combine electromagnetic, insulation, thermal, and mechanical simulation are better positioned to enter co-development programs with system OEMs. As modular power stages become more standardized, reusable magnetic subassemblies can improve design repeatability and expand volume-manufacturing opportunities.

Challenges

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The industry still supports multiple competing architectures, and DAB, LLC, and multilevel approaches impose different frequency, leakage-inductance, and isolation requirements. A unified product specification framework has not yet emerged. Delays in downstream SST projects, insufficient system-level efficiency gains relative to added cost, or failure to meet utility and data-center reliability requirements could slow order conversion. Suppliers must also balance power density, losses, temperature rise, partial-discharge margin, and manufacturing consistency over long operating lifetimes.

Industry Chain Analysis

Upstream inputs include ferrite, nanocrystalline, and amorphous cores; magnet wire, litz wire, and copper foil; and insulation films, bobbins, encapsulation resins, thermal materials, and cooling structures. Midstream manufacturers perform magnetic and winding design, insulation-system engineering, thermal simulation, prototyping, and dielectric, partial-discharge, and temperature-rise validation. Downstream customers include SST OEMs, power-electronics system integrators, and equipment supply chains serving data centers, charging, energy storage, renewable energy, and grid applications. Value creation is concentrated in high-voltage insulation design, low-loss magnetic circuits, parasitic-parameter control, and repeatable manufacturing rather than in simple material conversion, which supports stronger positioning for suppliers with co-design and automated test capability.

Segment Insights

By component type, the medium-/high-frequency isolation transformer is the core magnetic element for galvanic isolation and energy transfer between SST voltage domains, and generally carries higher technical complexity and unit value than auxiliary magnetics. Resonant and filter inductors are configured according to converter topology and module design. By frequency and core material, nanocrystalline and amorphous alloys are attractive in lower-to-mid tens-of-kilohertz designs where high flux density and low loss are important, while ferrites are widely used at higher frequencies and modular power levels. Planar and integrated magnetic structures should become more relevant as switching frequency and packaging density increase.

Downstream Market Opportunities

AI data centers are the most visible emerging demand opportunity because medium-voltage input, 800 VDC distribution, and high-density rack power create system value for SST architectures that reduce conventional conversion stages and electrical-room

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footprint. Ultra-fast EV charging, photovoltaic systems, battery storage, and microgrids place greater emphasis on bidirectional power flow, DC coupling, and flexible voltage regulation. Magnetic suppliers with reusable platforms for high-voltage isolation, high power density, and rigorous reliability validation can address several downstream markets and reduce dependence on a single application cycle.

Regional Insights

Asia-Pacific combines a broad soft-magnetic-material base with dense winding and power-electronics manufacturing capabilities. Chinese suppliers are accelerating development and demonstration of SST-specific high-frequency transformers for data-center and new-energy applications, while Japanese suppliers retain strong capabilities in advanced magnetic materials and medium-frequency transformer development. Europe has established engineering expertise in railway, industrial power electronics, smart-grid systems, and customized medium-frequency magnetics, with Germany hosting several specialized suppliers. North American opportunities are increasingly linked to AI data-center infrastructure, grid expansion, and investment in new power-electronic architectures, which can stimulate demand for high-end customized magnetics.

Competitive Landscape Analysis

Competition remains project-driven and customization-intensive. The principal differentiators are not the number of catalog products, but the ability to optimize high-voltage insulation, partial-discharge performance, losses, parasitic parameters, thermal management, and manufacturability as a complete system. Mentech and Jingquanhua have presented dedicated medium-/high-frequency transformer solutions for SST applications, while Sumida has publicly showcased SST-related and MW-class high-power magnetics. BLOCK, STS, Payton, Mdexx, Schmidbauer, Bourns, Eaglerise, and Agile Magnetics provide established capabilities in medium-/high-frequency transformers, inductors, or custom power magnetics that can address adjacent SST requirements. As SST platforms move from prototype validation toward repeatable architectures, suppliers with strong high-voltage testing, rapid prototyping, and stable volume manufacturing are better positioned to become long-term development and supply partners.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “High-Frequency Magnetic

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Components for SSTs Industry Forecast" looks at past sales and reviews total world High-Frequency Magnetic Components for SSTs sales in 2025, providing a comprehensive analysis by region and market sector of projected High-Frequency Magnetic Components for SSTs sales for 2026 through 2032. With High-Frequency Magnetic Components for SSTs sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world High-Frequency Magnetic Components for SSTs industry.

This Insight Report provides a comprehensive analysis of the global High-Frequency Magnetic Components for SSTs landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on High-Frequency Magnetic Components for SSTs portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global High-Frequency Magnetic Components for SSTs market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for High-Frequency Magnetic Components for SSTs and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global High-Frequency Magnetic Components for SSTs.

This report presents a comprehensive overview, market shares, and growth opportunities of High-Frequency Magnetic Components for SSTs market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Isolation Transformers

Resonant Inductors

Filter Inductors

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Auxiliary Transformers

Integrated Magnetics

Others

Segmentation by Rated Power:

Below 10 kW

10–<50 kW

50–<100 kW

100–<250 kW

250–<500 kW

500 kW and Above

Segmentation by Operating Frequency:

Below 10 kHz

10–<50 kHz

50–<100 kHz

100–<200 kHz

200 kHz and Above

Segmentation by Core Material:

Ferrite

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Nanocrystalline Alloy

Amorphous Alloy

Powder Core

Hybrid Core

Other Core Materials

Segmentation by Application:

Data Centers

EV Charging

Renewable Energy

Energy Storage

Power Grid

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

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- APAC
  - China
  - Japan
  - Korea
  - Southeast Asia
  - India
  - Australia
- Europe
  - Germany
  - France
  - UK
  - Italy
  - Russia
- Middle East & Africa
  - Egypt
  - South Africa
  - Israel
  - Turkey
  - GCC Countries

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The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Mentech

Jingquanhua

Eaglerise

Sumida

BLOCK

STS

Payton

Mdexx

Schmidbauer

Bourns

Agile Magnetics

Key Questions Addressed in this Report

What is the 10-year outlook for the global High-Frequency Magnetic Components for SSTs market?

What factors are driving High-Frequency Magnetic Components for SSTs market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do High-Frequency Magnetic Components for SSTs market opportunities

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vary by end market size?

How does High-Frequency Magnetic Components for SSTs break out by Type, by Application?

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Contents

1 SCOPE OF THE REPORT

1.1 Market Introduction
1.2 Years Considered
1.3 Research Objectives
1.4 Market Research Methodology
1.5 Research Process and Data Source
1.6 Economic Indicators
1.7 Currency Considered
1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview
  2.1.1 Global High-Frequency Magnetic Components for SSTs Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for High-Frequency Magnetic Components for SSTs by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for High-Frequency Magnetic Components for SSTs by Country/Region, 2021, 2025 & 2032
2.2 High-Frequency Magnetic Components for SSTs Segment by Type
  2.2.1 Isolation Transformers
  2.2.2 Resonant Inductors
  2.2.3 Filter Inductors
  2.2.4 Auxiliary Transformers
  2.2.5 Integrated Magnetics
  2.2.6 Others
  2.2.7 High-Frequency Magnetic Components for SSTs Sales by Type
    2.2.7.1 Global High-Frequency Magnetic Components for SSTs Sales Market Share by Type (2021-2026)
    2.2.7.2 Global High-Frequency Magnetic Components for SSTs Revenue and Market Share by Type (2021-2026)
    2.2.7.3 Global High-Frequency Magnetic Components for SSTs Sale Price by Type (2021-2026)
2.3 High-Frequency Magnetic Components for SSTs Segment by Rated Power
  2.3.1 Below 10 kW
  2.3.2 10–<50 kW

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2.3.3 50–<100 kW
2.3.4 100–<250 kW
2.3.5 250–<500 kW
2.3.6 500 kW and Above
2.3.7 High-Frequency Magnetic Components for SSTs Sales by Rated Power
2.3.7.1 Global High-Frequency Magnetic Components for SSTs Sales Market Share by Rated Power (2021-2026)
2.3.7.2 Global High-Frequency Magnetic Components for SSTs Revenue and Market Share by Rated Power (2021-2026)
2.3.7.3 Global High-Frequency Magnetic Components for SSTs Sale Price by Rated Power (2021-2026)
2.4 High-Frequency Magnetic Components for SSTs Segment by Operating Frequency
2.4.1 Below 10 kHz
2.4.2 10–<50 kHz
2.4.3 50–<100 kHz
2.4.4 100–<200 kHz
2.4.5 200 kHz and Above
2.4.6 High-Frequency Magnetic Components for SSTs Sales by Operating Frequency
2.4.6.1 Global High-Frequency Magnetic Components for SSTs Sales Market Share by Operating Frequency (2021-2026)
2.4.6.2 Global High-Frequency Magnetic Components for SSTs Revenue and Market Share by Operating Frequency (2021-2026)
2.4.6.3 Global High-Frequency Magnetic Components for SSTs Sale Price by Operating Frequency (2021-2026)
2.5 High-Frequency Magnetic Components for SSTs Segment by Core Material
2.5.1 Ferrite
2.5.2 Nanocrystalline Alloy
2.5.3 Amorphous Alloy
2.5.4 Powder Core
2.5.5 Hybrid Core
2.5.6 Other Core Materials
2.5.7 High-Frequency Magnetic Components for SSTs Sales by Core Material
2.5.7.1 Global High-Frequency Magnetic Components for SSTs Sales Market Share by Core Material (2021-2026)
2.5.7.2 Global High-Frequency Magnetic Components for SSTs Revenue and Market Share by Core Material (2021-2026)
2.5.7.3 Global High-Frequency Magnetic Components for SSTs Sale Price by Core Material (2021-2026)
2.6 High-Frequency Magnetic Components for SSTs Segment by Application

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2.6.1 Data Centers
2.6.2 EV Charging
2.6.3 Renewable Energy
2.6.4 Energy Storage
2.6.5 Power Grid
2.6.6 Others
2.6.7 High-Frequency Magnetic Components for SSTs Sales by Application
2.6.7.1 Global High-Frequency Magnetic Components for SSTs Sale Market Share by Application (2021-2026)
2.6.7.2 Global High-Frequency Magnetic Components for SSTs Revenue and Market Share by Application (2021-2026)
2.6.7.3 Global High-Frequency Magnetic Components for SSTs Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global High-Frequency Magnetic Components for SSTs Breakdown Data by Company
3.1.1 Global High-Frequency Magnetic Components for SSTs Annual Sales by Company (2021-2026)
3.1.2 Global High-Frequency Magnetic Components for SSTs Sales Market Share by Company (2021-2026)
3.2 Global High-Frequency Magnetic Components for SSTs Annual Revenue by Company (2021-2026)
3.2.1 Global High-Frequency Magnetic Components for SSTs Revenue by Company (2021-2026)
3.2.2 Global High-Frequency Magnetic Components for SSTs Revenue Market Share by Company (2021-2026)
3.3 Global High-Frequency Magnetic Components for SSTs Sale Price by Company
3.4 Key Manufacturers High-Frequency Magnetic Components for SSTs Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers High-Frequency Magnetic Components for SSTs Product Location Distribution
3.4.2 Players High-Frequency Magnetic Components for SSTs Products Offered
3.5 Market Concentration Rate Analysis
3.5.1 Competition Landscape Analysis
3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
3.6 New Products and Potential Entrants
3.7 Market M&A Activity & Strategy

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info@marketpublishers.com

4 WORLD HISTORIC REVIEW FOR HIGH-FREQUENCY MAGNETIC COMPONENTS FOR SSTS BY GEOGRAPHIC REGION

4.1 World Historic High-Frequency Magnetic Components for SSTs Market Size by Geographic Region (2021-2026)
4.1.1 Global High-Frequency Magnetic Components for SSTs Annual Sales by Geographic Region (2021-2026)
4.1.2 Global High-Frequency Magnetic Components for SSTs Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic High-Frequency Magnetic Components for SSTs Market Size by Country/Region (2021-2026)
4.2.1 Global High-Frequency Magnetic Components for SSTs Annual Sales by Country/Region (2021-2026)
4.2.2 Global High-Frequency Magnetic Components for SSTs Annual Revenue by Country/Region (2021-2026)
4.3 Americas High-Frequency Magnetic Components for SSTs Sales Growth
4.4 APAC High-Frequency Magnetic Components for SSTs Sales Growth
4.5 Europe High-Frequency Magnetic Components for SSTs Sales Growth
4.6 Middle East & Africa High-Frequency Magnetic Components for SSTs Sales Growth

5 AMERICAS

5.1 Americas High-Frequency Magnetic Components for SSTs Sales by Country
5.1.1 Americas High-Frequency Magnetic Components for SSTs Sales by Country (2021-2026)
5.1.2 Americas High-Frequency Magnetic Components for SSTs Revenue by Country (2021-2026)
5.2 Americas High-Frequency Magnetic Components for SSTs Sales by Type (2021-2026)
5.3 Americas High-Frequency Magnetic Components for SSTs Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

+357 96 030922
info@marketpublishers.com

6.1 APAC High-Frequency Magnetic Components for SSTs Sales by Region
6.1.1 APAC High-Frequency Magnetic Components for SSTs Sales by Region (2021-2026)
6.1.2 APAC High-Frequency Magnetic Components for SSTs Revenue by Region (2021-2026)
6.2 APAC High-Frequency Magnetic Components for SSTs Sales by Type (2021-2026)
6.3 APAC High-Frequency Magnetic Components for SSTs Sales by Application (2021-2026)
6.4 China
6.5 Japan
6.6 South Korea
6.7 Southeast Asia
6.8 India
6.9 Australia
6.10 China Taiwan

7 EUROPE

7.1 Europe High-Frequency Magnetic Components for SSTs by Country
7.1.1 Europe High-Frequency Magnetic Components for SSTs Sales by Country (2021-2026)
7.1.2 Europe High-Frequency Magnetic Components for SSTs Revenue by Country (2021-2026)
7.2 Europe High-Frequency Magnetic Components for SSTs Sales by Type (2021-2026)
7.3 Europe High-Frequency Magnetic Components for SSTs Sales by Application (2021-2026)
7.4 Germany
7.5 France
7.6 UK
7.7 Italy
7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa High-Frequency Magnetic Components for SSTs by Country
8.1.1 Middle East & Africa High-Frequency Magnetic Components for SSTs Sales by Country (2021-2026)
8.1.2 Middle East & Africa High-Frequency Magnetic Components for SSTs Revenue

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by Country (2021-2026)
8.2 Middle East & Africa High-Frequency Magnetic Components for SSTs Sales by Type (2021-2026)
8.3 Middle East & Africa High-Frequency Magnetic Components for SSTs Sales by Application (2021-2026)
8.4 Egypt
8.5 South Africa
8.6 Israel
8.7 Turkey
8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities
9.2 Market Challenges & Risks
9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of High-Frequency Magnetic Components for SSTs
10.3 Manufacturing Process Analysis of High-Frequency Magnetic Components for SSTs
10.4 Industry Chain Structure of High-Frequency Magnetic Components for SSTs

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
  11.1.1 Direct Channels
  11.1.2 Indirect Channels
11.2 High-Frequency Magnetic Components for SSTs Distributors
11.3 High-Frequency Magnetic Components for SSTs Customer

12 WORLD FORECAST REVIEW FOR HIGH-FREQUENCY MAGNETIC COMPONENTS FOR SSTS BY GEOGRAPHIC REGION

12.1 Global High-Frequency Magnetic Components for SSTs Market Size Forecast by Region

+357 96 030922
info@marketpublishers.com

12.1.1 Global High-Frequency Magnetic Components for SSTs Forecast by Region (2027-2032)
12.1.2 Global High-Frequency Magnetic Components for SSTs Annual Revenue Forecast by Region (2027-2032)
12.2 Americas Forecast by Country (2027-2032)
12.3 APAC Forecast by Region (2027-2032)
12.4 Europe Forecast by Country (2027-2032)
12.5 Middle East & Africa Forecast by Country (2027-2032)
12.6 Global High-Frequency Magnetic Components for SSTs Forecast by Type (2027-2032)
12.7 Global High-Frequency Magnetic Components for SSTs Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Mentech
13.1.1 Mentech Company Information
13.1.2 Mentech High-Frequency Magnetic Components for SSTs Product Portfolios and Specifications
13.1.3 Mentech High-Frequency Magnetic Components for SSTs Sales, Revenue, Price and Gross Margin (2021-2026)
13.1.4 Mentech Main Business Overview
13.1.5 Mentech Latest Developments
13.2 Jingquanhua
13.2.1 Jingquanhua Company Information
13.2.2 Jingquanhua High-Frequency Magnetic Components for SSTs Product Portfolios and Specifications
13.2.3 Jingquanhua High-Frequency Magnetic Components for SSTs Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 Jingquanhua Main Business Overview
13.2.5 Jingquanhua Latest Developments
13.3 Eaglerise
13.3.1 Eaglerise Company Information
13.3.2 Eaglerise High-Frequency Magnetic Components for SSTs Product Portfolios and Specifications
13.3.3 Eaglerise High-Frequency Magnetic Components for SSTs Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 Eaglerise Main Business Overview
13.3.5 Eaglerise Latest Developments

+357 96 030922
info@marketpublishers.com

13.4 Sumida
13.4.1 Sumida Company Information
13.4.2 Sumida High-Frequency Magnetic Components for SSTs Product Portfolios and Specifications
13.4.3 Sumida High-Frequency Magnetic Components for SSTs Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 Sumida Main Business Overview
13.4.5 Sumida Latest Developments
13.5 BLOCK
13.5.1 BLOCK Company Information
13.5.2 BLOCK High-Frequency Magnetic Components for SSTs Product Portfolios and Specifications
13.5.3 BLOCK High-Frequency Magnetic Components for SSTs Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 BLOCK Main Business Overview
13.5.5 BLOCK Latest Developments
13.6 STS
13.6.1 STS Company Information
13.6.2 STS High-Frequency Magnetic Components for SSTs Product Portfolios and Specifications
13.6.3 STS High-Frequency Magnetic Components for SSTs Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 STS Main Business Overview
13.6.5 STS Latest Developments
13.7 Payton
13.7.1 Payton Company Information
13.7.2 Payton High-Frequency Magnetic Components for SSTs Product Portfolios and Specifications
13.7.3 Payton High-Frequency Magnetic Components for SSTs Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 Payton Main Business Overview
13.7.5 Payton Latest Developments
13.8 Mdexx
13.8.1 Mdexx Company Information
13.8.2 Mdexx High-Frequency Magnetic Components for SSTs Product Portfolios and Specifications
13.8.3 Mdexx High-Frequency Magnetic Components for SSTs Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 Mdexx Main Business Overview

+357 96 030922
info@marketpublishers.com

13.8.5 Mdexx Latest Developments
13.9 Schmidbauer
13.9.1 Schmidbauer Company Information
13.9.2 Schmidbauer High-Frequency Magnetic Components for SSTs Product Portfolios and Specifications
13.9.3 Schmidbauer High-Frequency Magnetic Components for SSTs Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 Schmidbauer Main Business Overview
13.9.5 Schmidbauer Latest Developments
13.10 Bourns
13.10.1 Bourns Company Information
13.10.2 Bourns High-Frequency Magnetic Components for SSTs Product Portfolios and Specifications
13.10.3 Bourns High-Frequency Magnetic Components for SSTs Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 Bourns Main Business Overview
13.10.5 Bourns Latest Developments
13.11 Agile Magnetics
13.11.1 Agile Magnetics Company Information
13.11.2 Agile Magnetics High-Frequency Magnetic Components for SSTs Product Portfolios and Specifications
13.11.3 Agile Magnetics High-Frequency Magnetic Components for SSTs Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 Agile Magnetics Main Business Overview
13.11.5 Agile Magnetics Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

+357 96 030922
info@marketpublishers.com

List Of Tables

LIST OF TABLES

Table 1. High-Frequency Magnetic Components for SSTs Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. High-Frequency Magnetic Components for SSTs Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of Isolation Transformers
Table 4. Major Players of Resonant Inductors
Table 5. Major Players of Filter Inductors
Table 6. Major Players of Auxiliary Transformers
Table 7. Major Players of Integrated Magnetics
Table 8. Major Players of Others
Table 9. Global High-Frequency Magnetic Components for SSTs Sales by Type (2021-2026) & (K Units)
Table 10. Global High-Frequency Magnetic Components for SSTs Sales Market Share by Type (2021-2026)
Table 11. Global High-Frequency Magnetic Components for SSTs Revenue by Type (2021-2026) & ($ million)
Table 12. Global High-Frequency Magnetic Components for SSTs Revenue Market Share by Type (2021-2026)
Table 13. Global High-Frequency Magnetic Components for SSTs Sale Price by Type (2021-2026) & (US$/Unit)
Table 14. Major Players of Below 10 kW
Table 15. Major Players of 10–<50 kW
Table 16. Major Players of 50–<100 kW
Table 17. Major Players of 100–<250 kW
Table 18. Major Players of 250–<500 kW
Table 19. Major Players of 500 kW and Above
Table 20. Global High-Frequency Magnetic Components for SSTs Sales by Rated Power (2021-2026) & (K Units)
Table 21. Global High-Frequency Magnetic Components for SSTs Sales Market Share by Rated Power (2021-2026)
Table 22. Global High-Frequency Magnetic Components for SSTs Revenue by Rated Power (2021-2026) & ($ million)
Table 23. Global High-Frequency Magnetic Components for SSTs Revenue Market Share by Rated Power (2021-2026)
Table 24. Global High-Frequency Magnetic Components for SSTs Sale Price by Rated

+357 96 030922
info@marketpublishers.com

Power (2021-2026) & (US$/Unit)
Table 25. Major Players of Below 10 kHz
Table 26. Major Players of 10–<50 kHz
Table 27. Major Players of 50–<100 kHz
Table 28. Major Players of 100–<200 kHz
Table 29. Major Players of 200 kHz and Above
Table 30. Global High-Frequency Magnetic Components for SSTs Sales by Operating Frequency (2021-2026) & (K Units)
Table 31. Global High-Frequency Magnetic Components for SSTs Sales Market Share by Operating Frequency (2021-2026)
Table 32. Global High-Frequency Magnetic Components for SSTs Revenue by Operating Frequency (2021-2026) & ($ million)
Table 33. Global High-Frequency Magnetic Components for SSTs Revenue Market Share by Operating Frequency (2021-2026)
Table 34. Global High-Frequency Magnetic Components for SSTs Sale Price by Operating Frequency (2021-2026) & (US$/Unit)
Table 35. Major Players of Ferrite
Table 36. Major Players of Nanocrystalline Alloy
Table 37. Major Players of Amorphous Alloy
Table 38. Major Players of Powder Core
Table 39. Major Players of Hybrid Core
Table 40. Major Players of Other Core Materials
Table 41. Global High-Frequency Magnetic Components for SSTs Sales by Core Material (2021-2026) & (K Units)
Table 42. Global High-Frequency Magnetic Components for SSTs Sales Market Share by Core Material (2021-2026)
Table 43. Global High-Frequency Magnetic Components for SSTs Revenue by Core Material (2021-2026) & ($ million)
Table 44. Global High-Frequency Magnetic Components for SSTs Revenue Market Share by Core Material (2021-2026)
Table 45. Global High-Frequency Magnetic Components for SSTs Sale Price by Core Material (2021-2026) & (US$/Unit)
Table 46. Global High-Frequency Magnetic Components for SSTs Sale by Application (2021-2026) & (K Units)
Table 47. Global High-Frequency Magnetic Components for SSTs Sale Market Share by Application (2021-2026)
Table 48. Global High-Frequency Magnetic Components for SSTs Revenue by Application (2021-2026) & ($ million)
Table 49. Global High-Frequency Magnetic Components for SSTs Revenue Market

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Share by Application (2021-2026)
Table 50. Global High-Frequency Magnetic Components for SSTs Sale Price by Application (2021-2026) & (US$/Unit)
Table 51. Global High-Frequency Magnetic Components for SSTs Sales by Company (2021-2026) & (K Units)
Table 52. Global High-Frequency Magnetic Components for SSTs Sales Market Share by Company (2021-2026)
Table 53. Global High-Frequency Magnetic Components for SSTs Revenue by Company (2021-2026) & ($ millions)
Table 54. Global High-Frequency Magnetic Components for SSTs Revenue Market Share by Company (2021-2026)
Table 55. Global High-Frequency Magnetic Components for SSTs Sale Price by Company (2021-2026) & (US$/Unit)
Table 56. Key Manufacturers High-Frequency Magnetic Components for SSTs Producing Area Distribution and Sales Area
Table 57. Players High-Frequency Magnetic Components for SSTs Products Offered
Table 58. High-Frequency Magnetic Components for SSTs Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 59. New Products and Potential Entrants
Table 60. Market M&A Activity & Strategy
Table 61. Global High-Frequency Magnetic Components for SSTs Sales by Geographic Region (2021-2026) & (K Units)
Table 62. Global High-Frequency Magnetic Components for SSTs Sales Market Share Geographic Region (2021-2026)
Table 63. Global High-Frequency Magnetic Components for SSTs Revenue by Geographic Region (2021-2026) & ($ millions)
Table 64. Global High-Frequency Magnetic Components for SSTs Revenue Market Share by Geographic Region (2021-2026)
Table 65. Global High-Frequency Magnetic Components for SSTs Sales by Country/Region (2021-2026) & (K Units)
Table 66. Global High-Frequency Magnetic Components for SSTs Sales Market Share by Country/Region (2021-2026)
Table 67. Global High-Frequency Magnetic Components for SSTs Revenue by Country/Region (2021-2026) & ($ millions)
Table 68. Global High-Frequency Magnetic Components for SSTs Revenue Market Share by Country/Region (2021-2026)
Table 69. Americas High-Frequency Magnetic Components for SSTs Sales by Country (2021-2026) & (K Units)
Table 70. Americas High-Frequency Magnetic Components for SSTs Sales Market

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Share by Country (2021-2026)
Table 71. Americas High-Frequency Magnetic Components for SSTs Revenue by Country (2021-2026) & ($ millions)
Table 72. Americas High-Frequency Magnetic Components for SSTs Sales by Type (2021-2026) & (K Units)
Table 73. Americas High-Frequency Magnetic Components for SSTs Sales by Application (2021-2026) & (K Units)
Table 74. APAC High-Frequency Magnetic Components for SSTs Sales by Region (2021-2026) & (K Units)
Table 75. APAC High-Frequency Magnetic Components for SSTs Sales Market Share by Region (2021-2026)
Table 76. APAC High-Frequency Magnetic Components for SSTs Revenue by Region (2021-2026) & ($ millions)
Table 77. APAC High-Frequency Magnetic Components for SSTs Sales by Type (2021-2026) & (K Units)
Table 78. APAC High-Frequency Magnetic Components for SSTs Sales by Application (2021-2026) & (K Units)
Table 79. Europe High-Frequency Magnetic Components for SSTs Sales by Country (2021-2026) & (K Units)
Table 80. Europe High-Frequency Magnetic Components for SSTs Revenue by Country (2021-2026) & ($ millions)
Table 81. Europe High-Frequency Magnetic Components for SSTs Sales by Type (2021-2026) & (K Units)
Table 82. Europe High-Frequency Magnetic Components for SSTs Sales by Application (2021-2026) & (K Units)
Table 83. Middle East & Africa High-Frequency Magnetic Components for SSTs Sales by Country (2021-2026) & (K Units)
Table 84. Middle East & Africa High-Frequency Magnetic Components for SSTs Revenue Market Share by Country (2021-2026)
Table 85. Middle East & Africa High-Frequency Magnetic Components for SSTs Sales by Type (2021-2026) & (K Units)
Table 86. Middle East & Africa High-Frequency Magnetic Components for SSTs Sales by Application (2021-2026) & (K Units)
Table 87. Key Market Drivers & Growth Opportunities of High-Frequency Magnetic Components for SSTs
Table 88. Key Market Challenges & Risks of High-Frequency Magnetic Components for SSTs
Table 89. Key Industry Trends of High-Frequency Magnetic Components for SSTs
Table 90. High-Frequency Magnetic Components for SSTs Raw Material

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Table 91. Key Suppliers of Raw Materials
Table 92. High-Frequency Magnetic Components for SSTs Distributors List
Table 93. High-Frequency Magnetic Components for SSTs Customer List
Table 94. Global High-Frequency Magnetic Components for SSTs Sales Forecast by Region (2027-2032) & (K Units)
Table 95. Global High-Frequency Magnetic Components for SSTs Revenue Forecast by Region (2027-2032) & ($ millions)
Table 96. Americas High-Frequency Magnetic Components for SSTs Sales Forecast by Country (2027-2032) & (K Units)
Table 97. Americas High-Frequency Magnetic Components for SSTs Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 98. APAC High-Frequency Magnetic Components for SSTs Sales Forecast by Region (2027-2032) & (K Units)
Table 99. APAC High-Frequency Magnetic Components for SSTs Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 100. Europe High-Frequency Magnetic Components for SSTs Sales Forecast by Country (2027-2032) & (K Units)
Table 101. Europe High-Frequency Magnetic Components for SSTs Revenue Forecast by Country (2027-2032) & ($ millions)
Table 102. Middle East & Africa High-Frequency Magnetic Components for SSTs Sales Forecast by Country (2027-2032) & (K Units)
Table 103. Middle East & Africa High-Frequency Magnetic Components for SSTs Revenue Forecast by Country (2027-2032) & ($ millions)
Table 104. Global High-Frequency Magnetic Components for SSTs Sales Forecast by Type (2027-2032) & (K Units)
Table 105. Global High-Frequency Magnetic Components for SSTs Revenue Forecast by Type (2027-2032) & ($ millions)
Table 106. Global High-Frequency Magnetic Components for SSTs Sales Forecast by Application (2027-2032) & (K Units)
Table 107. Global High-Frequency Magnetic Components for SSTs Revenue Forecast by Application (2027-2032) & ($ millions)
Table 108. Mentech Basic Information, High-Frequency Magnetic Components for SSTs Manufacturing Base, Sales Area and Its Competitors
Table 109. Mentech High-Frequency Magnetic Components for SSTs Product Portfolios and Specifications
Table 110. Mentech High-Frequency Magnetic Components for SSTs Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 111. Mentech Main Business
Table 112. Mentech Latest Developments

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Table 113. Jingquanhua Basic Information, High-Frequency Magnetic Components for SSTs Manufacturing Base, Sales Area and Its Competitors
Table 114. Jingquanhua High-Frequency Magnetic Components for SSTs Product Portfolios and Specifications
Table 115. Jingquanhua High-Frequency Magnetic Components for SSTs Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 116. Jingquanhua Main Business
Table 117. Jingquanhua Latest Developments
Table 118. Eaglerise Basic Information, High-Frequency Magnetic Components for SSTs Manufacturing Base, Sales Area and Its Competitors
Table 119. Eaglerise High-Frequency Magnetic Components for SSTs Product Portfolios and Specifications
Table 120. Eaglerise High-Frequency Magnetic Components for SSTs Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 121. Eaglerise Main Business
Table 122. Eaglerise Latest Developments
Table 123. Sumida Basic Information, High-Frequency Magnetic Components for SSTs Manufacturing Base, Sales Area and Its Competitors
Table 124. Sumida High-Frequency Magnetic Components for SSTs Product Portfolios and Specifications
Table 125. Sumida High-Frequency Magnetic Components for SSTs Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 126. Sumida Main Business
Table 127. Sumida Latest Developments
Table 128. BLOCK Basic Information, High-Frequency Magnetic Components for SSTs Manufacturing Base, Sales Area and Its Competitors
Table 129. BLOCK High-Frequency Magnetic Components for SSTs Product Portfolios and Specifications
Table 130. BLOCK High-Frequency Magnetic Components for SSTs Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 131. BLOCK Main Business
Table 132. BLOCK Latest Developments
Table 133. STS Basic Information, High-Frequency Magnetic Components for SSTs Manufacturing Base, Sales Area and Its Competitors
Table 134. STS High-Frequency Magnetic Components for SSTs Product Portfolios and Specifications
Table 135. STS High-Frequency Magnetic Components for SSTs Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 136. STS Main Business

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Table 137. STS Latest Developments
Table 138. Payton Basic Information, High-Frequency Magnetic Components for SSTs Manufacturing Base, Sales Area and Its Competitors
Table 139. Payton High-Frequency Magnetic Components for SSTs Product Portfolios and Specifications
Table 140. Payton High-Frequency Magnetic Components for SSTs Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 141. Payton Main Business
Table 142. Payton Latest Developments
Table 143. Mdexx Basic Information, High-Frequency Magnetic Components for SSTs Manufacturing Base, Sales Area and Its Competitors
Table 144. Mdexx High-Frequency Magnetic Components for SSTs Product Portfolios and Specifications
Table 145. Mdexx High-Frequency Magnetic Components for SSTs Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 146. Mdexx Main Business
Table 147. Mdexx Latest Developments
Table 148. Schmidbauer Basic Information, High-Frequency Magnetic Components for SSTs Manufacturing Base, Sales Area and Its Competitors
Table 149. Schmidbauer High-Frequency Magnetic Components for SSTs Product Portfolios and Specifications
Table 150. Schmidbauer High-Frequency Magnetic Components for SSTs Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 151. Schmidbauer Main Business
Table 152. Schmidbauer Latest Developments
Table 153. Bourns Basic Information, High-Frequency Magnetic Components for SSTs Manufacturing Base, Sales Area and Its Competitors
Table 154. Bourns High-Frequency Magnetic Components for SSTs Product Portfolios and Specifications
Table 155. Bourns High-Frequency Magnetic Components for SSTs Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 156. Bourns Main Business
Table 157. Bourns Latest Developments
Table 158. Agile Magnetics Basic Information, High-Frequency Magnetic Components for SSTs Manufacturing Base, Sales Area and Its Competitors
Table 159. Agile Magnetics High-Frequency Magnetic Components for SSTs Product Portfolios and Specifications
Table 160. Agile Magnetics High-Frequency Magnetic Components for SSTs Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)

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Table 161. Agile Magnetics Main Business
Table 162. Agile Magnetics Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of High-Frequency Magnetic Components for SSTs
Figure 2. High-Frequency Magnetic Components for SSTs Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global High-Frequency Magnetic Components for SSTs Sales Growth Rate 2021-2032 (K Units)
Figure 7. Global High-Frequency Magnetic Components for SSTs Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. High-Frequency Magnetic Components for SSTs Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. High-Frequency Magnetic Components for SSTs Sales Market Share by Country/Region (2025)
Figure 10. High-Frequency Magnetic Components for SSTs Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of Isolation Transformers
Figure 12. Product Picture of Resonant Inductors
Figure 13. Product Picture of Filter Inductors
Figure 14. Product Picture of Auxiliary Transformers
Figure 15. Product Picture of Integrated Magnetics
Figure 16. Product Picture of Others
Figure 17. Global High-Frequency Magnetic Components for SSTs Sales Market Share by Type in 2026
Figure 18. Global High-Frequency Magnetic Components for SSTs Revenue Market Share by Type (2021-2026)
Figure 19. Product Picture of Below 10 kW
Figure 20. Product Picture of 10–<50 kW
Figure 21. Product Picture of 50–<100 kW
Figure 22. Product Picture of 100–<250 kW
Figure 23. Product Picture of 250–<500 kW
Figure 24. Product Picture of 500 kW and Above
Figure 25. Global High-Frequency Magnetic Components for SSTs Sales Market Share by Rated Power in 2026
Figure 26. Global High-Frequency Magnetic Components for SSTs Revenue Market Share by Rated Power (2021-2026)

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Figure 27. Product Picture of Below 10 kHz
Figure 28. Product Picture of 10–<50 kHz
Figure 29. Product Picture of 50–<100 kHz
Figure 30. Product Picture of 100–<200 kHz
Figure 31. Product Picture of 200 kHz and Above
Figure 32. Global High-Frequency Magnetic Components for SSTs Sales Market Share by Operating Frequency in 2026
Figure 33. Global High-Frequency Magnetic Components for SSTs Revenue Market Share by Operating Frequency (2021-2026)
Figure 34. Product Picture of Ferrite
Figure 35. Product Picture of Nanocrystalline Alloy
Figure 36. Product Picture of Amorphous Alloy
Figure 37. Product Picture of Powder Core
Figure 38. Product Picture of Hybrid Core
Figure 39. Product Picture of Other Core Materials
Figure 40. Global High-Frequency Magnetic Components for SSTs Sales Market Share by Core Material in 2026
Figure 41. Global High-Frequency Magnetic Components for SSTs Revenue Market Share by Core Material (2021-2026)
Figure 42. High-Frequency Magnetic Components for SSTs Consumed in Data Centers
Figure 43. Global High-Frequency Magnetic Components for SSTs Market: Data Centers (2021-2026) & (K Units)
Figure 44. High-Frequency Magnetic Components for SSTs Consumed in EV Charging
Figure 45. Global High-Frequency Magnetic Components for SSTs Market: EV Charging (2021-2026) & (K Units)
Figure 46. High-Frequency Magnetic Components for SSTs Consumed in Renewable Energy
Figure 47. Global High-Frequency Magnetic Components for SSTs Market: Renewable Energy (2021-2026) & (K Units)
Figure 48. High-Frequency Magnetic Components for SSTs Consumed in Energy Storage
Figure 49. Global High-Frequency Magnetic Components for SSTs Market: Energy Storage (2021-2026) & (K Units)
Figure 50. High-Frequency Magnetic Components for SSTs Consumed in Power Grid
Figure 51. Global High-Frequency Magnetic Components for SSTs Market: Power Grid (2021-2026) & (K Units)
Figure 52. High-Frequency Magnetic Components for SSTs Consumed in Others
Figure 53. Global High-Frequency Magnetic Components for SSTs Market: Others (2021-2026) & (K Units)

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Figure 54. Global High-Frequency Magnetic Components for SSTs Sale Market Share by Application (2025)
Figure 55. Global High-Frequency Magnetic Components for SSTs Revenue Market Share by Application in 2025
Figure 56. High-Frequency Magnetic Components for SSTs Sales by Company in 2025 (K Units)
Figure 57. Global High-Frequency Magnetic Components for SSTs Sales Market Share by Company in 2025
Figure 58. High-Frequency Magnetic Components for SSTs Revenue by Company in 2025 ($ millions)
Figure 59. Global High-Frequency Magnetic Components for SSTs Revenue Market Share by Company in 2025
Figure 60. Global High-Frequency Magnetic Components for SSTs Sales Market Share by Geographic Region (2021-2026)
Figure 61. Global High-Frequency Magnetic Components for SSTs Revenue Market Share by Geographic Region in 2025
Figure 62. Americas High-Frequency Magnetic Components for SSTs Sales 2021-2026 (K Units)
Figure 63. Americas High-Frequency Magnetic Components for SSTs Revenue 2021-2026 ($ millions)
Figure 64. APAC High-Frequency Magnetic Components for SSTs Sales 2021-2026 (K Units)
Figure 65. APAC High-Frequency Magnetic Components for SSTs Revenue 2021-2026 ($ millions)
Figure 66. Europe High-Frequency Magnetic Components for SSTs Sales 2021-2026 (K Units)
Figure 67. Europe High-Frequency Magnetic Components for SSTs Revenue 2021-2026 ($ millions)
Figure 68. Middle East & Africa High-Frequency Magnetic Components for SSTs Sales 2021-2026 (K Units)
Figure 69. Middle East & Africa High-Frequency Magnetic Components for SSTs Revenue 2021-2026 ($ millions)
Figure 70. Americas High-Frequency Magnetic Components for SSTs Sales Market Share by Country in 2025
Figure 71. Americas High-Frequency Magnetic Components for SSTs Revenue Market Share by Country (2021-2026)
Figure 72. Americas High-Frequency Magnetic Components for SSTs Sales Market Share by Type (2021-2026)
Figure 73. Americas High-Frequency Magnetic Components for SSTs Sales Market

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Share by Application (2021-2026)
Figure 74. United States High-Frequency Magnetic Components for SSTs Revenue Growth 2021-2026 ($ millions)
Figure 75. Canada High-Frequency Magnetic Components for SSTs Revenue Growth 2021-2026 ($ millions)
Figure 76. Mexico High-Frequency Magnetic Components for SSTs Revenue Growth 2021-2026 ($ millions)
Figure 77. Brazil High-Frequency Magnetic Components for SSTs Revenue Growth 2021-2026 ($ millions)
Figure 78. APAC High-Frequency Magnetic Components for SSTs Sales Market Share by Region in 2025
Figure 79. APAC High-Frequency Magnetic Components for SSTs Revenue Market Share by Region (2021-2026)
Figure 80. APAC High-Frequency Magnetic Components for SSTs Sales Market Share by Type (2021-2026)
Figure 81. APAC High-Frequency Magnetic Components for SSTs Sales Market Share by Application (2021-2026)
Figure 82. China High-Frequency Magnetic Components for SSTs Revenue Growth 2021-2026 ($ millions)
Figure 83. Japan High-Frequency Magnetic Components for SSTs Revenue Growth 2021-2026 ($ millions)
Figure 84. South Korea High-Frequency Magnetic Components for SSTs Revenue Growth 2021-2026 ($ millions)
Figure 85. Southeast Asia High-Frequency Magnetic Components for SSTs Revenue Growth 2021-2026 ($ millions)
Figure 86. India High-Frequency Magnetic Components for SSTs Revenue Growth 2021-2026 ($ millions)
Figure 87. Australia High-Frequency Magnetic Components for SSTs Revenue Growth 2021-2026 ($ millions)
Figure 88. China Taiwan High-Frequency Magnetic Components for SSTs Revenue Growth 2021-2026 ($ millions)
Figure 89. Europe High-Frequency Magnetic Components for SSTs Sales Market Share by Country in 2025
Figure 90. Europe High-Frequency Magnetic Components for SSTs Revenue Market Share by Country (2021-2026)
Figure 91. Europe High-Frequency Magnetic Components for SSTs Sales Market Share by Type (2021-2026)
Figure 92. Europe High-Frequency Magnetic Components for SSTs Sales Market Share by Application (2021-2026)

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Figure 93. Germany High-Frequency Magnetic Components for SSTs Revenue Growth 2021-2026 ($ millions)
Figure 94. France High-Frequency Magnetic Components for SSTs Revenue Growth 2021-2026 ($ millions)
Figure 95. UK High-Frequency Magnetic Components for SSTs Revenue Growth 2021-2026 ($ millions)
Figure 96. Italy High-Frequency Magnetic Components for SSTs Revenue Growth 2021-2026 ($ millions)
Figure 97. Russia High-Frequency Magnetic Components for SSTs Revenue Growth 2021-2026 ($ millions)
Figure 98. Middle East & Africa High-Frequency Magnetic Components for SSTs Sales Market Share by Country (2021-2026)
Figure 99. Middle East & Africa High-Frequency Magnetic Components for SSTs Sales Market Share by Type (2021-2026)
Figure 100. Middle East & Africa High-Frequency Magnetic Components for SSTs Sales Market Share by Application (2021-2026)
Figure 101. Egypt High-Frequency Magnetic Components for SSTs Revenue Growth 2021-2026 ($ millions)
Figure 102. South Africa High-Frequency Magnetic Components for SSTs Revenue Growth 2021-2026 ($ millions)
Figure 103. Israel High-Frequency Magnetic Components for SSTs Revenue Growth 2021-2026 ($ millions)
Figure 104. Turkey High-Frequency Magnetic Components for SSTs Revenue Growth 2021-2026 ($ millions)
Figure 105. GCC Countries High-Frequency Magnetic Components for SSTs Revenue Growth 2021-2026 ($ millions)
Figure 106. Manufacturing Cost Structure Analysis of High-Frequency Magnetic Components for SSTs in 2026
Figure 107. Manufacturing Process Analysis of High-Frequency Magnetic Components for SSTs
Figure 108. Industry Chain Structure of High-Frequency Magnetic Components for SSTs
Figure 109. Channels of Distribution
Figure 110. Global High-Frequency Magnetic Components for SSTs Sales Market Forecast by Region (2027-2032)
Figure 111. Global High-Frequency Magnetic Components for SSTs Revenue Market Share Forecast by Region (2027-2032)
Figure 112. Global High-Frequency Magnetic Components for SSTs Sales Market Share Forecast by Type (2027-2032)

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Figure 113. Global High-Frequency Magnetic Components for SSTs Revenue Market Share Forecast by Type (2027-2032)
Figure 114. Global High-Frequency Magnetic Components for SSTs Sales Market Share Forecast by Application (2027-2032)
Figure 115. Global High-Frequency Magnetic Components for SSTs Revenue Market Share Forecast by Application (2027-2032)

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