

# Global mmWave Antenna Module Market Growth 2026-2032

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## Abstracts

The global mmWave Antenna Module market size is predicted to grow from US\$ 7135 million in 2025 to US\$ 18425 million in 2032; it is expected to grow at a CAGR of 11.0% from 2026 to 2032.

Millimeter-wave antenna modules are integrated RF antenna components designed for high-frequency communication and sensing systems from 24 GHz to 100 GHz. They typically integrate antenna arrays, beamforming circuits, RF front ends, filters, frequency conversion, package substrates, control interfaces, and calibration data into compact modules or package structures to address challenges such as high millimeter-wave propagation loss, sensitivity of feed paths, limited terminal space, and complex beam management. Their core function is to enable high-gain directional transmission and reception, fast beam switching, multi-polarization coverage, and low-loss RF transmission within a constrained form factor. Key technologies include phased-array antennas, antenna-in-package, system-in-package, antenna array integration, RF front-end co-design, over-the-air testing, and thermal management. Typical applications include 5G millimeter-wave smartphones, fixed wireless access terminals, customer premises equipment, small cells, repeaters, automotive and industrial millimeter-wave radar, satellite communication terminals, and R&D validation platforms. Major customers include communication terminal manufacturers, network equipment vendors, automotive electronics suppliers, industrial sensing equipment manufacturers, packaging foundries, operator equipment supply chains, and high-frequency R&D institutions.

Millimeter-wave antenna modules are evolving from simple antenna components into high-frequency integration platforms within communication and sensing systems. As 5G millimeter wave, fixed wireless access, private network coverage, satellite

communications, and high-resolution radar move into scaled validation, the module no longer performs only a radiation function. It must coordinate antenna arrays, beamforming, RF front ends, frequency conversion, package substrates, thermal design, and calibration data within a compact structure. Because millimeter-wave bands have high path loss, weak diffraction, sensitivity to package interconnect loss, and limited terminal space, industry competition is shifting from the performance of individual RF devices to module-level system efficiency. Companies with antenna design, RF chip adaptation, package integration, over-the-air testing, and mass manufacturing capabilities are more likely to secure customer design-ins. Future value growth will mainly come from higher integration, lower insertion loss, broader band coverage, faster beam switching, and more stable mass-production consistency. As terminal form factors change rapidly, customers will increasingly value suppliers that can participate early in structural design and solve RF, electromagnetic, thermal, mechanical, and compliance testing issues at the same time. Supply chain influence will concentrate among suppliers capable of providing complete module solutions and engineering validation capabilities. This will push the industry from a component procurement logic toward platform-based collaborative development.

On the supply side, communication chip vendors, antenna module companies, packaging foundries, electronic manufacturing service providers, and professional test solution vendors are all participating. However, the truly valuable mass-production links are concentrated in antenna array design, antenna-in-package, RF front-end integration, and over-the-air validation. Japan, South Korea, the United States, Taiwan, and mainland China each have different strengths in the value chain. Japanese companies have deeper experience in high-frequency materials, precision modules, and communication components. South Korean companies are more prominent in package substrates, mobile terminals, and communication module collaboration. U.S. companies have strong influence in baseband platforms, RF chips, beamforming, and development platforms. Taiwan and mainland China have strong capabilities in electronic manufacturing, antenna design, packaging services, and system integration. Because terminal customers usually require modules to be optimized together with device structure, RF paths, thermal space, and network standards, suppliers that only provide discrete antennas face difficulty building high barriers. Suppliers with joint development and test validation capabilities are more likely to enter high-end customer supply chains. As frequencies extend higher, product validation will rely more on chambers, probes, calibration algorithms, and consistency testing. Manufacturing capability and validation capability will jointly determine suppliers' long-term competitive positions. As a result, regional industrial specialization will become clearer, and leading customers will prioritize partners with stable delivery experience.

Demand growth is not driven only by rising penetration of millimeter-wave smartphones. It also comes from fixed wireless access, indoor and outdoor coverage enhancement, private-network small cells, automotive and industrial radar, low-earth-orbit satellite terminals, and high-frequency experimental platforms for 6G. Fixed wireless access and repeaters are more sensitive to high gain, long range, low cost, and rapid deployment. Mobile terminals are more sensitive to miniaturization, low power consumption, thermal design, and blockage resistance. Radar sensing is more sensitive to angular resolution, detection range, and signal processing coordination. Satellite terminals place greater emphasis on array scale, beam pointing, and broadband adaptability. Future market expansion will be driven by multiple applications in parallel. Prices may gradually decline for standardized smartphone and customer premises equipment modules, while high-performance phased arrays, automotive-grade radar, satellite terminals, and customized development platforms will continue to maintain higher added value. As high-frequency packaging, low-loss materials, automated testing, and module calibration mature, the manufacturability of millimeter-wave antenna modules will further improve and stimulate growth in upstream materials, packaging equipment, test instruments, and RF design services. In the medium to long term, millimeter-wave antenna modules will become an important cross-sector field connecting wireless communication, intelligent sensing, and high-frequency packaging. Their market potential will continue to expand with upgrades in high-frequency communication infrastructure and smart terminals.

LP Information, Inc. (LPI) ' newest research report, the "mmWave Antenna Module Industry Forecast" looks at past sales and reviews total world mmWave Antenna Module sales in 2025, providing a comprehensive analysis by region and market sector of projected mmWave Antenna Module sales for 2026 through 2032. With mmWave Antenna Module sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world mmWave Antenna Module industry.

This Insight Report provides a comprehensive analysis of the global mmWave Antenna Module 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 mmWave Antenna Module portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global mmWave Antenna Module market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for mmWave Antenna Module and breaks down the forecast by Array Scale, 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 mmWave Antenna Module.

This report presents a comprehensive overview, market shares, and growth opportunities of mmWave Antenna Module market by product type, application, key manufacturers and key regions and countries.

#### Segmentation by Array Scale:

Below 16 Elements

32 Elements

64 Elements

Over 100 Elements

#### Segmentation by Beam Method:

Fixed Beam

Analog Phased Array

Digitally Controlled Phased Array

External Platform Control

#### Segmentation by Terminal Form Factor:

Smartphone Embedded

Customer Premises Equipment

Small Cell Equipment

Repeater Coverage Equipment

Vehicle and Industrial Equipment

Laboratory Platform

#### Segmentation by Application:

Mobile Terminal Communication

Fixed Wireless Access

Indoor and Outdoor Coverage Enhancement

Small Cell Access

Satellite Communication Terminal

Automotive and Industrial Radar Sensing

R&D Testing and Validation

#### This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

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.

Qualcomm

Murata Manufacturing

Fujikura

Kyocera

Doosan Corporation Electro-Materials

Hanwha NxMD

LG Innotek

Wistron NeWeb Corporation

TMYTEK

Auden Techno

ASE Technology Holding

Amkor Technology

Texas Instruments

Movandi

Otava

Qorvo

Taoglas

Sivers Semiconductors

### Key Questions Addressed in this Report

What is the 10-year outlook for the global mmWave Antenna Module market?

What factors are driving mmWave Antenna Module market growth, globally and by region?

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

How do mmWave Antenna Module market opportunities vary by end market size?

How does mmWave Antenna Module break out by Array Scale, by Application?



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