

Global Surface Acoustic Wave Device Market Growth 2026-2032

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Abstracts

The global Surface Acoustic Wave Device market size is predicted to grow from US\$ 2628 million in 2025 to US\$ 3673 million in 2032; it is expected to grow at a CAGR of 4.7% from 2026 to 2032.

Surface Acoustic Wave Devices (SAW Devices) are a class of electronic components based on the piezoelectric effect, which generate and manipulate acoustic waves on the surface of a piezoelectric material to process, transmit, or detect electrical signals. These devices include a broad range of functional products, such as SAW filters for RF signal filtering, SAW resonators for oscillation control, SAW delay lines for time delay and phase shift processing, and SAW sensors for physical quantity measurement. SAW devices first emerged during the development of microelectromechanical systems (MEMS) technology. With the rapid advancement of smart terminals, wireless communications, automotive electronics, and the Internet of Things (IoT), they have become indispensable components in high-frequency signal front-end modules and sensing platforms. In modern mobile communication systems, SAW devices are widely integrated into RF front-end modules to eliminate unwanted frequency components, improve signal selectivity, and enhance stability. In the sensing field, their sensitivity to pressure, temperature, and chemical quantities has driven adoption in industrial automation and environmental monitoring. SAW technology offers simple structure, cost efficiency, miniaturization, and high reliability. It is widely deployed across high-frequency wireless communications (including 4G/5G), consumer electronics, automotive electronics, and aerospace industries, while continuous innovation extends its applications to higher frequency bands and more complex systems. This definition reflects industry practice and technology fundamentals to ensure accurate understanding of the product's value and nature.

Market Development Opportunities & Main Driving Factors

The demand for SAW devices continues to grow, driven by the rapid evolution of global communication technologies and the intelligentization of end devices. The full deployment of 5G and exploration toward future 6G frequencies are creating strong demand for high-performance SAW filters and resonators, particularly in devices that require multi-band and multi-protocol compatibility. In consumer electronics, smartphones, tablets, and wearable devices drive the need for smaller, more integrated, and low-power components, fostering innovation and large-scale production of piezoelectric-based SAW devices. Additionally, the expansion of IoT and automotive sensing systems, including advanced driver-assistance systems (ADAS), vehicle networking, and tire pressure monitoring, increases the adoption of SAW sensors requiring high reliability and environmental adaptability. Furthermore, government policies supporting next-generation communication technologies and advanced semiconductor components?through tax incentives, R&D subsidies, and industry collaboration platforms?create a favorable environment for innovation and industrialization in the SAW device market. Collectively, these factors serve as major growth drivers for the SAW device industry.

Market Challenges, Risks, & Restraints

Despite significant growth potential, the SAW device industry faces several challenges. Technologically, conventional SAW devices face performance limitations at higher frequency bands, such as millimeter-wave ranges, where BAW (Bulk Acoustic Wave) technology may offer advantages, posing higher requirements for material and design innovation. Additionally, fluctuations in the supply and cost of high-quality piezoelectric substrates introduce uncertainties in manufacturing costs, particularly affecting smaller manufacturers. Intellectual property is another critical risk; leading companies often hold extensive patent portfolios and enforce them through legal actions, creating barriers for new entrants and potential legal exposure. For example, major manufacturers have filed patent infringement lawsuits in multiple countries regarding TF-SAW designs, involving core device structures. Geopolitical and trade uncertainties, including export restrictions and technology control policies, may also disrupt global supply chains and impact the consistent availability of SAW devices. These technological, legal, and supply chain risks require careful consideration for stakeholders.

Downstream Demand Trends

Downstream demand for SAW devices is highly diversified across applications. In

telecommunications and wireless communication, the deployment of 5G and future 6G networks drives increasing demand for high-performance RF filters and resonators, which are critical for multi-band and multi-standard devices. In consumer electronics, demand for miniaturized and low-power devices continues to encourage the development of compact and highly integrated SAW devices. In automotive electronics, the advancement of intelligent, connected vehicles increases the use of SAW devices in environmental sensing, ADAS, and vehicle-to-everything (V2X) communication systems. Industrial automation and environmental monitoring also benefit from SAW sensors due to their stability and passive operation, with applications in pressure, temperature, chemical detection, and industrial control. Additionally, IoT ecosystems expand the need for low-cost, reliable SAW solutions in smart homes, energy management, and smart city infrastructure. Collectively, these trends illustrate a broadening and multi-layered adoption of SAW devices across downstream markets.

Regional Trends

Regional SAW device demand exhibits distinct characteristics. In North America, mature communication infrastructure and strong R&D investment drive growth in high-value, high-performance SAW devices and innovation in advanced RF technologies. In China and the broader Asia-Pacific region, the large-scale production of consumer electronics and high smartphone shipments make the region one of the largest SAW device demand centers globally, while local manufacturers rapidly enhance production and supply chain capabilities, supported by industrial policies and investment. In Europe, the stable automotive and industrial automation sectors create strong demand for high-reliability sensing systems and RF components, stimulating adoption of high-performance SAW devices. Other regions, such as Latin America and the Middle East & Africa, are gradually upgrading communication infrastructure, leading to moderate growth in RF component demand, although total market volume remains smaller. While regional priorities differ, they collectively drive a multi-tiered, globally diversified SAW device demand landscape.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Surface Acoustic Wave Device 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 Surface Acoustic Wave Device.

This report presents a comprehensive overview, market shares, and growth opportunities of Surface Acoustic Wave Device market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

SAW Filter

SAW Resonator

SAW Oscillator

SAW Delay Line

SAW Sensor

Segmentation by Substrate Material:

Quartz

Lithium Niobate (LiNbO₃)

Lithium Tantalate (LiTaO₃)

Segmentation by Performance Feature:

Temperature-Compensated SAW (TC-SAW)

High-Power SAW

High-Q SAW

Wide Band SAW

Miniaturized/Compact SAW

Segmentation by Application:

Telecommunications & Wireless

Consumer Electronics

Automotive Systems

Industrial Automation

Aerospace & Defence

Medical Devices

Wearables

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.

API Technologies

EPCOS

ITF

Infineon

Kyocera

Murata

Qorvo

RF360 Holdings

Skyworks Solutions

Taiyo Yuden

Key Questions Addressed in this Report

What is the 10-year outlook for the global Surface Acoustic Wave Device market?

What factors are driving Surface Acoustic Wave Device market growth, globally and by region?

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

How do Surface Acoustic Wave Device market opportunities vary by end market size?

How does Surface Acoustic Wave Device break out by Type, by Application?

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 Surface Acoustic Wave Device Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for Surface Acoustic Wave Device by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for Surface Acoustic Wave Device by Country/Region, 2021, 2025 & 2032
- 2.2 Surface Acoustic Wave Device Segment by Type
 - 2.2.1 SAW Filter
 - 2.2.2 SAW Resonator
 - 2.2.3 SAW Oscillator
 - 2.2.4 SAW Delay Line
 - 2.2.5 SAW Sensor
 - 2.2.6 Surface Acoustic Wave Device Sales by Type
 - 2.2.6.1 Global Surface Acoustic Wave Device Sales Market Share by Type (2021-2026)
 - 2.2.6.2 Global Surface Acoustic Wave Device Revenue and Market Share by Type (2021-2026)
 - 2.2.6.3 Global Surface Acoustic Wave Device Sale Price by Type (2021-2026)
- 2.3 Surface Acoustic Wave Device Segment by Substrate Material
 - 2.3.1 Quartz
 - 2.3.2 Lithium Niobate (LiNbO₃)
 - 2.3.3 Lithium Tantalate (LiTaO₃)
 - 2.3.4 Surface Acoustic Wave Device Sales by Substrate Material
 - 2.3.4.1 Global Surface Acoustic Wave Device Sales Market Share by Substrate

Material (2021-2026)

2.3.4.2 Global Surface Acoustic Wave Device Revenue and Market Share by Substrate Material (2021-2026)

2.3.4.3 Global Surface Acoustic Wave Device Sale Price by Substrate Material (2021-2026)

2.4 Surface Acoustic Wave Device Segment by Performance Feature

2.4.1 Temperature?Compensated SAW (TC?SAW)

2.4.2 High?Power SAW

2.4.3 High?Q SAW

2.4.4 Wide Band SAW

2.4.5 Miniaturized/Compact SAW

2.4.6 Surface Acoustic Wave Device Sales by Performance Feature

2.4.6.1 Global Surface Acoustic Wave Device Sales Market Share by Performance Feature (2021-2026)

2.4.6.2 Global Surface Acoustic Wave Device Revenue and Market Share by Performance Feature (2021-2026)

2.4.6.3 Global Surface Acoustic Wave Device Sale Price by Performance Feature (2021-2026)

2.5 Surface Acoustic Wave Device Segment by Application

2.5.1 Telecommunications & Wireless

2.5.2 Consumer Electronics

2.5.3 Automotive Systems

2.5.4 Industrial Automation

2.5.5 Aerospace & Defence

2.5.6 Medical Devices

2.5.7 Wearables

2.5.8 Surface Acoustic Wave Device Sales by Application

2.5.8.1 Global Surface Acoustic Wave Device Sale Market Share by Application (2021-2026)

2.5.8.2 Global Surface Acoustic Wave Device Revenue and Market Share by Application (2021-2026)

2.5.8.3 Global Surface Acoustic Wave Device Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Surface Acoustic Wave Device Breakdown Data by Company

3.1.1 Global Surface Acoustic Wave Device Annual Sales by Company (2021-2026)

3.1.2 Global Surface Acoustic Wave Device Sales Market Share by Company (2021-2026)

3.2 Global Surface Acoustic Wave Device Annual Revenue by Company (2021-2026)

3.2.1 Global Surface Acoustic Wave Device Revenue by Company (2021-2026)

3.2.2 Global Surface Acoustic Wave Device Revenue Market Share by Company (2021-2026)

3.3 Global Surface Acoustic Wave Device Sale Price by Company

3.4 Key Manufacturers Surface Acoustic Wave Device Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Surface Acoustic Wave Device Product Location Distribution

3.4.2 Players Surface Acoustic Wave Device 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

4 WORLD HISTORIC REVIEW FOR SURFACE ACOUSTIC WAVE DEVICE BY GEOGRAPHIC REGION

4.1 World Historic Surface Acoustic Wave Device Market Size by Geographic Region (2021-2026)

4.1.1 Global Surface Acoustic Wave Device Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Surface Acoustic Wave Device Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Surface Acoustic Wave Device Market Size by Country/Region (2021-2026)

4.2.1 Global Surface Acoustic Wave Device Annual Sales by Country/Region (2021-2026)

4.2.2 Global Surface Acoustic Wave Device Annual Revenue by Country/Region (2021-2026)

4.3 Americas Surface Acoustic Wave Device Sales Growth

4.4 APAC Surface Acoustic Wave Device Sales Growth

4.5 Europe Surface Acoustic Wave Device Sales Growth

4.6 Middle East & Africa Surface Acoustic Wave Device Sales Growth

5 AMERICAS

5.1 Americas Surface Acoustic Wave Device Sales by Country

5.1.1 Americas Surface Acoustic Wave Device Sales by Country (2021-2026)

- 5.1.2 Americas Surface Acoustic Wave Device Revenue by Country (2021-2026)
- 5.2 Americas Surface Acoustic Wave Device Sales by Type (2021-2026)
- 5.3 Americas Surface Acoustic Wave Device Sales by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

6 APAC

- 6.1 APAC Surface Acoustic Wave Device Sales by Region
 - 6.1.1 APAC Surface Acoustic Wave Device Sales by Region (2021-2026)
 - 6.1.2 APAC Surface Acoustic Wave Device Revenue by Region (2021-2026)
- 6.2 APAC Surface Acoustic Wave Device Sales by Type (2021-2026)
- 6.3 APAC Surface Acoustic Wave Device 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 Surface Acoustic Wave Device by Country
 - 7.1.1 Europe Surface Acoustic Wave Device Sales by Country (2021-2026)
 - 7.1.2 Europe Surface Acoustic Wave Device Revenue by Country (2021-2026)
- 7.2 Europe Surface Acoustic Wave Device Sales by Type (2021-2026)
- 7.3 Europe Surface Acoustic Wave Device 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 Surface Acoustic Wave Device by Country

8.1.1 Middle East & Africa Surface Acoustic Wave Device Sales by Country
(2021-2026)

8.1.2 Middle East & Africa Surface Acoustic Wave Device Revenue by Country
(2021-2026)

8.2 Middle East & Africa Surface Acoustic Wave Device Sales by Type (2021-2026)

8.3 Middle East & Africa Surface Acoustic Wave Device 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 Surface Acoustic Wave Device

10.3 Manufacturing Process Analysis of Surface Acoustic Wave Device

10.4 Industry Chain Structure of Surface Acoustic Wave Device

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Surface Acoustic Wave Device Distributors

11.3 Surface Acoustic Wave Device Customer

12 WORLD FORECAST REVIEW FOR SURFACE ACOUSTIC WAVE DEVICE BY GEOGRAPHIC REGION

12.1 Global Surface Acoustic Wave Device Market Size Forecast by Region

12.1.1 Global Surface Acoustic Wave Device Forecast by Region (2027-2032)

12.1.2 Global Surface Acoustic Wave Device 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 Surface Acoustic Wave Device Forecast by Type (2027-2032)

12.7 Global Surface Acoustic Wave Device Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 API Technologies

13.1.1 API Technologies Company Information

13.1.2 API Technologies Surface Acoustic Wave Device Product Portfolios and Specifications

13.1.3 API Technologies Surface Acoustic Wave Device Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 API Technologies Main Business Overview

13.1.5 API Technologies Latest Developments

13.2 EPCOS

13.2.1 EPCOS Company Information

13.2.2 EPCOS Surface Acoustic Wave Device Product Portfolios and Specifications

13.2.3 EPCOS Surface Acoustic Wave Device Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 EPCOS Main Business Overview

13.2.5 EPCOS Latest Developments

13.3 ITF

13.3.1 ITF Company Information

13.3.2 ITF Surface Acoustic Wave Device Product Portfolios and Specifications

13.3.3 ITF Surface Acoustic Wave Device Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 ITF Main Business Overview

13.3.5 ITF Latest Developments

13.4 Infineon

13.4.1 Infineon Company Information

13.4.2 Infineon Surface Acoustic Wave Device Product Portfolios and Specifications

13.4.3 Infineon Surface Acoustic Wave Device Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 Infineon Main Business Overview

- 13.4.5 Infineon Latest Developments
- 13.5 Kyocera
 - 13.5.1 Kyocera Company Information
 - 13.5.2 Kyocera Surface Acoustic Wave Device Product Portfolios and Specifications
 - 13.5.3 Kyocera Surface Acoustic Wave Device Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.5.4 Kyocera Main Business Overview
 - 13.5.5 Kyocera Latest Developments
- 13.6 Murata
 - 13.6.1 Murata Company Information
 - 13.6.2 Murata Surface Acoustic Wave Device Product Portfolios and Specifications
 - 13.6.3 Murata Surface Acoustic Wave Device Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.6.4 Murata Main Business Overview
 - 13.6.5 Murata Latest Developments
- 13.7 Qorvo
 - 13.7.1 Qorvo Company Information
 - 13.7.2 Qorvo Surface Acoustic Wave Device Product Portfolios and Specifications
 - 13.7.3 Qorvo Surface Acoustic Wave Device Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.7.4 Qorvo Main Business Overview
 - 13.7.5 Qorvo Latest Developments
- 13.8 RF360 Holdings
 - 13.8.1 RF360 Holdings Company Information
 - 13.8.2 RF360 Holdings Surface Acoustic Wave Device Product Portfolios and Specifications
 - 13.8.3 RF360 Holdings Surface Acoustic Wave Device Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.8.4 RF360 Holdings Main Business Overview
 - 13.8.5 RF360 Holdings Latest Developments
- 13.9 Skyworks Solutions
 - 13.9.1 Skyworks Solutions Company Information
 - 13.9.2 Skyworks Solutions Surface Acoustic Wave Device Product Portfolios and Specifications
 - 13.9.3 Skyworks Solutions Surface Acoustic Wave Device Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.9.4 Skyworks Solutions Main Business Overview
 - 13.9.5 Skyworks Solutions Latest Developments
- 13.10 Taiyo Yuden

13.10.1 Taiyo Yuden Company Information

13.10.2 Taiyo Yuden Surface Acoustic Wave Device Product Portfolios and Specifications

13.10.3 Taiyo Yuden Surface Acoustic Wave Device Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 Taiyo Yuden Main Business Overview

13.10.5 Taiyo Yuden Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Surface Acoustic Wave Device Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Surface Acoustic Wave Device Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of SAW Filter

Table 4. Major Players of SAW Resonator

Table 5. Major Players of SAW Oscillator

Table 6. Major Players of SAW Delay Line

Table 7. Major Players of SAW Sensor

Table 8. Global Surface Acoustic Wave Device Sales by Type (2021-2026) & (Units)

Table 9. Global Surface Acoustic Wave Device Sales Market Share by Type (2021-2026)

Table 10. Global Surface Acoustic Wave Device Revenue by Type (2021-2026) & (\$ million)

Table 11. Global Surface Acoustic Wave Device Revenue Market Share by Type (2021-2026)

Table 12. Global Surface Acoustic Wave Device Sale Price by Type (2021-2026) & (US\$/Unit)

Table 13. Major Players of Quartz

Table 14. Major Players of Lithium Niobate (LiNbO₃)

Table 15. Major Players of Lithium Tantalate (LiTaO₃)

Table 16. Global Surface Acoustic Wave Device Sales by Substrate Material (2021-2026) & (Units)

Table 17. Global Surface Acoustic Wave Device Sales Market Share by Substrate Material (2021-2026)

Table 18. Global Surface Acoustic Wave Device Revenue by Substrate Material (2021-2026) & (\$ million)

Table 19. Global Surface Acoustic Wave Device Revenue Market Share by Substrate Material (2021-2026)

Table 20. Global Surface Acoustic Wave Device Sale Price by Substrate Material (2021-2026) & (US\$/Unit)

Table 21. Major Players of Temperature-Compensated SAW (TC-SAW)

Table 22. Major Players of High-Power SAW

Table 23. Major Players of High-Q SAW

Table 24. Major Players of Wide Band SAW

Table 25. Major Players of Miniaturized/Compact SAW
Table 26. Global Surface Acoustic Wave Device Sales by Performance Feature (2021-2026) & (Units)
Table 27. Global Surface Acoustic Wave Device Sales Market Share by Performance Feature (2021-2026)
Table 28. Global Surface Acoustic Wave Device Revenue by Performance Feature (2021-2026) & (\$ million)
Table 29. Global Surface Acoustic Wave Device Revenue Market Share by Performance Feature (2021-2026)
Table 30. Global Surface Acoustic Wave Device Sale Price by Performance Feature (2021-2026) & (US\$/Unit)
Table 31. Global Surface Acoustic Wave Device Sale by Application (2021-2026) & (Units)
Table 32. Global Surface Acoustic Wave Device Sale Market Share by Application (2021-2026)
Table 33. Global Surface Acoustic Wave Device Revenue by Application (2021-2026) & (\$ million)
Table 34. Global Surface Acoustic Wave Device Revenue Market Share by Application (2021-2026)
Table 35. Global Surface Acoustic Wave Device Sale Price by Application (2021-2026) & (US\$/Unit)
Table 36. Global Surface Acoustic Wave Device Sales by Company (2021-2026) & (Units)
Table 37. Global Surface Acoustic Wave Device Sales Market Share by Company (2021-2026)
Table 38. Global Surface Acoustic Wave Device Revenue by Company (2021-2026) & (\$ millions)
Table 39. Global Surface Acoustic Wave Device Revenue Market Share by Company (2021-2026)
Table 40. Global Surface Acoustic Wave Device Sale Price by Company (2021-2026) & (US\$/Unit)
Table 41. Key Manufacturers Surface Acoustic Wave Device Producing Area Distribution and Sales Area
Table 42. Players Surface Acoustic Wave Device Products Offered
Table 43. Surface Acoustic Wave Device Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 44. New Products and Potential Entrants
Table 45. Market M&A Activity & Strategy
Table 46. Global Surface Acoustic Wave Device Sales by Geographic Region

(2021-2026) & (Units)

Table 47. Global Surface Acoustic Wave Device Sales Market Share Geographic Region (2021-2026)

Table 48. Global Surface Acoustic Wave Device Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 49. Global Surface Acoustic Wave Device Revenue Market Share by Geographic Region (2021-2026)

Table 50. Global Surface Acoustic Wave Device Sales by Country/Region (2021-2026) & (Units)

Table 51. Global Surface Acoustic Wave Device Sales Market Share by Country/Region (2021-2026)

Table 52. Global Surface Acoustic Wave Device Revenue by Country/Region (2021-2026) & (\$ millions)

Table 53. Global Surface Acoustic Wave Device Revenue Market Share by Country/Region (2021-2026)

Table 54. Americas Surface Acoustic Wave Device Sales by Country (2021-2026) & (Units)

Table 55. Americas Surface Acoustic Wave Device Sales Market Share by Country (2021-2026)

Table 56. Americas Surface Acoustic Wave Device Revenue by Country (2021-2026) & (\$ millions)

Table 57. Americas Surface Acoustic Wave Device Sales by Type (2021-2026) & (Units)

Table 58. Americas Surface Acoustic Wave Device Sales by Application (2021-2026) & (Units)

Table 59. APAC Surface Acoustic Wave Device Sales by Region (2021-2026) & (Units)

Table 60. APAC Surface Acoustic Wave Device Sales Market Share by Region (2021-2026)

Table 61. APAC Surface Acoustic Wave Device Revenue by Region (2021-2026) & (\$ millions)

Table 62. APAC Surface Acoustic Wave Device Sales by Type (2021-2026) & (Units)

Table 63. APAC Surface Acoustic Wave Device Sales by Application (2021-2026) & (Units)

Table 64. Europe Surface Acoustic Wave Device Sales by Country (2021-2026) & (Units)

Table 65. Europe Surface Acoustic Wave Device Revenue by Country (2021-2026) & (\$ millions)

Table 66. Europe Surface Acoustic Wave Device Sales by Type (2021-2026) & (Units)

Table 67. Europe Surface Acoustic Wave Device Sales by Application (2021-2026) &

(Units)

Table 68. Middle East & Africa Surface Acoustic Wave Device Sales by Country (2021-2026) & (Units)

Table 69. Middle East & Africa Surface Acoustic Wave Device Revenue Market Share by Country (2021-2026)

Table 70. Middle East & Africa Surface Acoustic Wave Device Sales by Type (2021-2026) & (Units)

Table 71. Middle East & Africa Surface Acoustic Wave Device Sales by Application (2021-2026) & (Units)

Table 72. Key Market Drivers & Growth Opportunities of Surface Acoustic Wave Device

Table 73. Key Market Challenges & Risks of Surface Acoustic Wave Device

Table 74. Key Industry Trends of Surface Acoustic Wave Device

Table 75. Surface Acoustic Wave Device Raw Material

Table 76. Key Suppliers of Raw Materials

Table 77. Surface Acoustic Wave Device Distributors List

Table 78. Surface Acoustic Wave Device Customer List

Table 79. Global Surface Acoustic Wave Device Sales Forecast by Region (2027-2032) & (Units)

Table 80. Global Surface Acoustic Wave Device Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 81. Americas Surface Acoustic Wave Device Sales Forecast by Country (2027-2032) & (Units)

Table 82. Americas Surface Acoustic Wave Device Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 83. APAC Surface Acoustic Wave Device Sales Forecast by Region (2027-2032) & (Units)

Table 84. APAC Surface Acoustic Wave Device Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 85. Europe Surface Acoustic Wave Device Sales Forecast by Country (2027-2032) & (Units)

Table 86. Europe Surface Acoustic Wave Device Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 87. Middle East & Africa Surface Acoustic Wave Device Sales Forecast by Country (2027-2032) & (Units)

Table 88. Middle East & Africa Surface Acoustic Wave Device Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 89. Global Surface Acoustic Wave Device Sales Forecast by Type (2027-2032) & (Units)

Table 90. Global Surface Acoustic Wave Device Revenue Forecast by Type

(2027-2032) & (\$ millions)

Table 91. Global Surface Acoustic Wave Device Sales Forecast by Application

(2027-2032) & (Units)

Table 92. Global Surface Acoustic Wave Device Revenue Forecast by Application

(2027-2032) & (\$ millions)

Table 93. API Technologies Basic Information, Surface Acoustic Wave Device Manufacturing Base, Sales Area and Its Competitors

Table 94. API Technologies Surface Acoustic Wave Device Product Portfolios and Specifications

Table 95. API Technologies Surface Acoustic Wave Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 96. API Technologies Main Business

Table 97. API Technologies Latest Developments

Table 98. EPCOS Basic Information, Surface Acoustic Wave Device Manufacturing Base, Sales Area and Its Competitors

Table 99. EPCOS Surface Acoustic Wave Device Product Portfolios and Specifications

Table 100. EPCOS Surface Acoustic Wave Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 101. EPCOS Main Business

Table 102. EPCOS Latest Developments

Table 103. ITF Basic Information, Surface Acoustic Wave Device Manufacturing Base, Sales Area and Its Competitors

Table 104. ITF Surface Acoustic Wave Device Product Portfolios and Specifications

Table 105. ITF Surface Acoustic Wave Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 106. ITF Main Business

Table 107. ITF Latest Developments

Table 108. Infineon Basic Information, Surface Acoustic Wave Device Manufacturing Base, Sales Area and Its Competitors

Table 109. Infineon Surface Acoustic Wave Device Product Portfolios and Specifications

Table 110. Infineon Surface Acoustic Wave Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 111. Infineon Main Business

Table 112. Infineon Latest Developments

Table 113. Kyocera Basic Information, Surface Acoustic Wave Device Manufacturing Base, Sales Area and Its Competitors

Table 114. Kyocera Surface Acoustic Wave Device Product Portfolios and Specifications

Table 115. Kyocera Surface Acoustic Wave Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 116. Kyocera Main Business

Table 117. Kyocera Latest Developments

Table 118. Murata Basic Information, Surface Acoustic Wave Device Manufacturing Base, Sales Area and Its Competitors

Table 119. Murata Surface Acoustic Wave Device Product Portfolios and Specifications

Table 120. Murata Surface Acoustic Wave Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 121. Murata Main Business

Table 122. Murata Latest Developments

Table 123. Qorvo Basic Information, Surface Acoustic Wave Device Manufacturing Base, Sales Area and Its Competitors

Table 124. Qorvo Surface Acoustic Wave Device Product Portfolios and Specifications

Table 125. Qorvo Surface Acoustic Wave Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 126. Qorvo Main Business

Table 127. Qorvo Latest Developments

Table 128. RF360 Holdings Basic Information, Surface Acoustic Wave Device Manufacturing Base, Sales Area and Its Competitors

Table 129. RF360 Holdings Surface Acoustic Wave Device Product Portfolios and Specifications

Table 130. RF360 Holdings Surface Acoustic Wave Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 131. RF360 Holdings Main Business

Table 132. RF360 Holdings Latest Developments

Table 133. Skyworks Solutions Basic Information, Surface Acoustic Wave Device Manufacturing Base, Sales Area and Its Competitors

Table 134. Skyworks Solutions Surface Acoustic Wave Device Product Portfolios and Specifications

Table 135. Skyworks Solutions Surface Acoustic Wave Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 136. Skyworks Solutions Main Business

Table 137. Skyworks Solutions Latest Developments

Table 138. Taiyo Yuden Basic Information, Surface Acoustic Wave Device Manufacturing Base, Sales Area and Its Competitors

Table 139. Taiyo Yuden Surface Acoustic Wave Device Product Portfolios and Specifications

Table 140. Taiyo Yuden Surface Acoustic Wave Device Sales (Units), Revenue (\$

Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 141. Taiyo Yuden Main Business

Table 142. Taiyo Yuden Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Surface Acoustic Wave Device
- Figure 2. Surface Acoustic Wave Device Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Surface Acoustic Wave Device Sales Growth Rate 2021-2032 (Units)
- Figure 7. Global Surface Acoustic Wave Device Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Surface Acoustic Wave Device Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Surface Acoustic Wave Device Sales Market Share by Country/Region (2025)
- Figure 10. Surface Acoustic Wave Device Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of SAW Filter
- Figure 12. Product Picture of SAW Resonator
- Figure 13. Product Picture of SAW Oscillator
- Figure 14. Product Picture of SAW Delay Line
- Figure 15. Product Picture of SAW Sensor
- Figure 16. Global Surface Acoustic Wave Device Sales Market Share by Type in 2026
- Figure 17. Global Surface Acoustic Wave Device Revenue Market Share by Type (2021-2026)
- Figure 18. Product Picture of Quartz
- Figure 19. Product Picture of Lithium Niobate (LiNbO₃)
- Figure 20. Product Picture of Lithium Tantalate (LiTaO₃)
- Figure 21. Global Surface Acoustic Wave Device Sales Market Share by Substrate Material in 2026
- Figure 22. Global Surface Acoustic Wave Device Revenue Market Share by Substrate Material (2021-2026)
- Figure 23. Product Picture of Temperature-Compensated SAW (TC-SAW)
- Figure 24. Product Picture of High-Power SAW
- Figure 25. Product Picture of High-Q SAW
- Figure 26. Product Picture of Wide Band SAW
- Figure 27. Product Picture of Miniaturized/Compact SAW
- Figure 28. Global Surface Acoustic Wave Device Sales Market Share by Performance Feature in 2026

- Figure 29. Global Surface Acoustic Wave Device Revenue Market Share by Performance Feature (2021-2026)
- Figure 30. Surface Acoustic Wave Device Consumed in Telecommunications & Wireless
- Figure 31. Global Surface Acoustic Wave Device Market: Telecommunications & Wireless (2021-2026) & (Units)
- Figure 32. Surface Acoustic Wave Device Consumed in Consumer Electronics
- Figure 33. Global Surface Acoustic Wave Device Market: Consumer Electronics (2021-2026) & (Units)
- Figure 34. Surface Acoustic Wave Device Consumed in Automotive Systems
- Figure 35. Global Surface Acoustic Wave Device Market: Automotive Systems (2021-2026) & (Units)
- Figure 36. Surface Acoustic Wave Device Consumed in Industrial Automation
- Figure 37. Global Surface Acoustic Wave Device Market: Industrial Automation (2021-2026) & (Units)
- Figure 38. Surface Acoustic Wave Device Consumed in Aerospace & Defence
- Figure 39. Global Surface Acoustic Wave Device Market: Aerospace & Defence (2021-2026) & (Units)
- Figure 40. Surface Acoustic Wave Device Consumed in Medical Devices
- Figure 41. Global Surface Acoustic Wave Device Market: Medical Devices (2021-2026) & (Units)
- Figure 42. Surface Acoustic Wave Device Consumed in Wearables
- Figure 43. Global Surface Acoustic Wave Device Market: Wearables (2021-2026) & (Units)
- Figure 44. Global Surface Acoustic Wave Device Sale Market Share by Application (2025)
- Figure 45. Global Surface Acoustic Wave Device Revenue Market Share by Application in 2025
- Figure 46. Surface Acoustic Wave Device Sales by Company in 2025 (Units)
- Figure 47. Global Surface Acoustic Wave Device Sales Market Share by Company in 2025
- Figure 48. Surface Acoustic Wave Device Revenue by Company in 2025 (\$ millions)
- Figure 49. Global Surface Acoustic Wave Device Revenue Market Share by Company in 2025
- Figure 50. Global Surface Acoustic Wave Device Sales Market Share by Geographic Region (2021-2026)
- Figure 51. Global Surface Acoustic Wave Device Revenue Market Share by Geographic Region in 2025
- Figure 52. Americas Surface Acoustic Wave Device Sales 2021-2026 (Units)

Figure 53. Americas Surface Acoustic Wave Device Revenue 2021-2026 (\$ millions)

Figure 54. APAC Surface Acoustic Wave Device Sales 2021-2026 (Units)

Figure 55. APAC Surface Acoustic Wave Device Revenue 2021-2026 (\$ millions)

Figure 56. Europe Surface Acoustic Wave Device Sales 2021-2026 (Units)

Figure 57. Europe Surface Acoustic Wave Device Revenue 2021-2026 (\$ millions)

Figure 58. Middle East & Africa Surface Acoustic Wave Device Sales 2021-2026 (Units)

Figure 59. Middle East & Africa Surface Acoustic Wave Device Revenue 2021-2026 (\$ millions)

Figure 60. Americas Surface Acoustic Wave Device Sales Market Share by Country in 2025

Figure 61. Americas Surface Acoustic Wave Device Revenue Market Share by Country (2021-2026)

Figure 62. Americas Surface Acoustic Wave Device Sales Market Share by Type (2021-2026)

Figure 63. Americas Surface Acoustic Wave Device Sales Market Share by Application (2021-2026)

Figure 64. United States Surface Acoustic Wave Device Revenue Growth 2021-2026 (\$ millions)

Figure 65. Canada Surface Acoustic Wave Device Revenue Growth 2021-2026 (\$ millions)

Figure 66. Mexico Surface Acoustic Wave Device Revenue Growth 2021-2026 (\$ millions)

Figure 67. Brazil Surface Acoustic Wave Device Revenue Growth 2021-2026 (\$ millions)

Figure 68. APAC Surface Acoustic Wave Device Sales Market Share by Region in 2025

Figure 69. APAC Surface Acoustic Wave Device Revenue Market Share by Region (2021-2026)

Figure 70. APAC Surface Acoustic Wave Device Sales Market Share by Type (2021-2026)

Figure 71. APAC Surface Acoustic Wave Device Sales Market Share by Application (2021-2026)

Figure 72. China Surface Acoustic Wave Device Revenue Growth 2021-2026 (\$ millions)

Figure 73. Japan Surface Acoustic Wave Device Revenue Growth 2021-2026 (\$ millions)

Figure 74. South Korea Surface Acoustic Wave Device Revenue Growth 2021-2026 (\$ millions)

Figure 75. Southeast Asia Surface Acoustic Wave Device Revenue Growth 2021-2026 (\$ millions)

Figure 76. India Surface Acoustic Wave Device Revenue Growth 2021-2026 (\$ millions)

Figure 77. Australia Surface Acoustic Wave Device Revenue Growth 2021-2026 (\$ millions)

Figure 78. China Taiwan Surface Acoustic Wave Device Revenue Growth 2021-2026 (\$ millions)

Figure 79. Europe Surface Acoustic Wave Device Sales Market Share by Country in 2025

Figure 80. Europe Surface Acoustic Wave Device Revenue Market Share by Country (2021-2026)

Figure 81. Europe Surface Acoustic Wave Device Sales Market Share by Type (2021-2026)

Figure 82. Europe Surface Acoustic Wave Device Sales Market Share by Application (2021-2026)

Figure 83. Germany Surface Acoustic Wave Device Revenue Growth 2021-2026 (\$ millions)

Figure 84. France Surface Acoustic Wave Device Revenue Growth 2021-2026 (\$ millions)

Figure 85. UK Surface Acoustic Wave Device Revenue Growth 2021-2026 (\$ millions)

Figure 86. Italy Surface Acoustic Wave Device Revenue Growth 2021-2026 (\$ millions)

Figure 87. Russia Surface Acoustic Wave Device Revenue Growth 2021-2026 (\$ millions)

Figure 88. Middle East & Africa Surface Acoustic Wave Device Sales Market Share by Country (2021-2026)

Figure 89. Middle East & Africa Surface Acoustic Wave Device Sales Market Share by Type (2021-2026)

Figure 90. Middle East & Africa Surface Acoustic Wave Device Sales Market Share by Application (2021-2026)

Figure 91. Egypt Surface Acoustic Wave Device Revenue Growth 2021-2026 (\$ millions)

Figure 92. South Africa Surface Acoustic Wave Device Revenue Growth 2021-2026 (\$ millions)

Figure 93. Israel Surface Acoustic Wave Device Revenue Growth 2021-2026 (\$ millions)

Figure 94. Turkey Surface Acoustic Wave Device Revenue Growth 2021-2026 (\$ millions)

Figure 95. GCC Countries Surface Acoustic Wave Device Revenue Growth 2021-2026 (\$ millions)

Figure 96. Manufacturing Cost Structure Analysis of Surface Acoustic Wave Device in 2026

Figure 97. Manufacturing Process Analysis of Surface Acoustic Wave Device

Figure 98. Industry Chain Structure of Surface Acoustic Wave Device

Figure 99. Channels of Distribution

Figure 100. Global Surface Acoustic Wave Device Sales Market Forecast by Region (2027-2032)

Figure 101. Global Surface Acoustic Wave Device Revenue Market Share Forecast by Region (2027-2032)

Figure 102. Global Surface Acoustic Wave Device Sales Market Share Forecast by Type (2027-2032)

Figure 103. Global Surface Acoustic Wave Device Revenue Market Share Forecast by Type (2027-2032)

Figure 104. Global Surface Acoustic Wave Device Sales Market Share Forecast by Application (2027-2032)

Figure 105. Global Surface Acoustic Wave Device Revenue Market Share Forecast by Application (2027-2032)

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