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EMC Shielding and Test Equipment Market Forecasts to 2032 – Global Analysis By Type (EMC Shielding and EMC Test Equipment), Testing Type (Pre-compliance Testing and Full Compliance Testing), Frequency Range, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global EMC Shielding and Test Equipment Market is accounted for $2.17 billion in 2025 and is expected to reach $3.40 billion by 2032 growing at a CAGR of 6.62% during the forecast period. Systems and instruments used to reduce or quantify electromagnetic interference (EMI) in electronic equipment are referred to as EMC (Electromagnetic Compatibility) Shielding and Test Equipment. Shielding ensures that electronics function without interference by using materials and casings that prevent harmful electromagnetic radiation. During development and certification, test equipment measures emissions and immunity levels to assess a product's conformity with EMC laws. These solutions help manufacturers achieve safety regulations, ensure performance reliability, and lower the risk of malfunction caused by electromagnetic disturbances, making them crucial across industries like consumer electronics, telecommunications, automotive, and aerospace.

According to the National Institute of Standards and Technology, innovations in materials for electromagnetic shielding can significantly improve performance while reducing weight and cost.

Market Dynamics:

Driver:

Growth in automotive electronics & EVs

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Advanced electronic systems like infotainment, power electronics, and ADAS are integrated into modern cars, necessitating strict EMC compliance. Effective shielding is essential to preventing electromagnetic interference because EVs use high-voltage components. Strict EMC regulations enforced by regulatory agencies necessitate the use of trustworthy testing apparatus. To guarantee vehicle performance and safety, automakers are investing more on EMC solutions. The market need for testing instruments and shielding materials is increasing due to the growing integration of complicated electronics.

Restraint:

High cost of advanced shielding materials & equipment

Shielding equipment and materials, like conductive coatings and specialized enclosures, are costly due to their intricate manufacturing procedures. Budgetary restrictions frequently prevent small and medium-sized businesses from investing in expensive EMC solutions. Furthermore, adoption is hindered in emerging economies and cost-sensitive industries by the high upfront costs. Longer return on investment times and slower market penetration are the results of this. Manufacturers might therefore put off improvements or choose less efficient substitutes, which would hinder the growth of the market as a whole.

Opportunity:

Technological innovation in materials & testing automation

Advanced shielding materials that improve protection against electromagnetic interference include conductive polymers and nanocomposites. For contemporary electrical equipment, these improvements provide better lightweight, flexible, and durable solutions. EMC testing automation improves testing speed and accuracy, decreases human error, and simplifies procedures. Predictive maintenance and real-time diagnostics are further enhanced by combining AI and machine learning. All of these developments contribute to the increasing need for dependable, high-performance electronic systems in various industries.

Threat:

Limited EMC awareness & skilled workforce

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The significance of EMC compliance is often overlooked by organisations until product malfunctions or legal problems occur. Investment in crucial EMC solutions is delayed by this ignorance. Furthermore, appropriate EMC system installation, testing, and maintenance are hampered by the lack of qualified personnel. Due to a lack of internal experience, businesses find it difficult to meet regulatory requirements. Consequently, market expansion is constrained, particularly in emerging nations.

Covid-19 Impact:

The COVID-19 pandemic significantly disrupted the EMC Shielding and Test Equipment Market due to global supply chain interruptions, factory shutdowns, and reduced industrial operations. Travel restrictions and lockdowns delayed testing activities and product launches, leading to postponed or cancelled projects. However, the demand for advanced electronics in medical devices, communication infrastructure, and remote working tools provided partial market support. As industries gradually resumed operations, manufacturers adapted by accelerating digital transformation and investing in automation to enhance efficiency and meet evolving electromagnetic compliance standards in a post-pandemic environment.

The vents and honeycombs segment is expected to be the largest during the forecast period

The vents and honeycombs segment is expected to account for the largest market share during the forecast period by offering effective airflow management while maintaining electromagnetic compatibility. These components help prevent EMI leakage in enclosures without compromising thermal performance. Their lightweight and customizable design makes them suitable for compact electronic devices and military-grade equipment. Increasing demand for high-performance electronics across aerospace, automotive, and telecommunications sectors fuels their adoption. As regulations around EMC compliance tighten, manufacturers increasingly rely on advanced venting solutions to meet stringent standards.

The full compliance testing segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the full compliance testing segment is predicted to witness the highest growth rate by ensuring products meet stringent regulatory standards across global markets. It drives demand for advanced shielding and testing tools to verify

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electromagnetic compatibility in complex electronic systems. This segment is essential for industries like automotive, aerospace, and telecommunications, where safety and reliability are critical. Growing adoption of electric and connected devices increases the need for thorough EMC compliance, boosting market growth. Additionally, rising government regulations and certification requirements fuels the investments in full compliance testing solutions.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, driven by rapid industrialization, increasing electronic component production, and rising adoption of 5G technology. Countries like China, Japan, South Korea, and India are heavily investing in automotive electronics, consumer electronics, and smart infrastructure, boosting demand for EMC solutions. Government support for local manufacturing and advancements in wireless communication are further propelling market expansion. The region's strong electronics export market and growing demand for regulatory compliance testing are also key factors enhancing the need for high-performance shielding and testing systems.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, primarily driven by stringent regulatory standards and increasing demand from aerospace, defense, and healthcare sectors. The presence of leading tech companies and a focus on innovation in autonomous vehicles, military systems, and medical devices push the need for robust EMC testing. High investments in R&D, strong emphasis on electromagnetic compatibility compliance, and growing awareness about EMI issues also contribute significantly. The market growth is stable, supported by continued upgrades in testing infrastructure and increasing efforts toward product certification and quality assurance across industries.

Key players in the market

Some of the key players in EMC Shielding and Test Equipment Market include Rohde & Schwarz GmbH & Co. KG, Keysight Technologies, Inc., AR RF/Microwave Instrumentation, Microwave Vision Group (MVG), Yokogawa Electric Corporation, Anritsu Corporation, GAUSS INSTRUMENTS GmbH, Signal Hound, Tektronix, Inc., Rigol Technologies, Inc., 3M Company, Tech-Etch, Inc., Henkel AG & Co. KGaA, MAJR Products Corporation, Schaffner Holding AG, Parker Hannifin Corporation, Laird

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Performance Materials and Holland Shielding Systems BV.

Key Developments:

In June 2025, Keysight partnered with TOYO Corporation to integrate its enhanced PXE EMI Receiver with TOYO's EPX software. This collaboration enables a high-performance EMC testing solution that supports real-time analysis, automation, and efficient workflow management, helping users accelerate compliance testing with improved accuracy, speed, and diagnostic capabilities.

In March 2024, Rohde & Schwarz showcased its advanced EMC test portfolio, including the R&S EPL1000 EMI receiver with 4-channel CISPR 14-1:2020 compliance and the R&S ESW with 970 MHz FFT bandwidth. The lineup also featured BBA300 amplifiers, ELEKTRA automation, AdVISE software, MXO and RTO6 oscilloscopes, and the FPH analyzer with EMF antennas up to 44 GHz.

Types Covered:

- EMC Shielding
- EMC Test Equipment

Testing Types Covered:

- Pre-compliance Testing
- Full Compliance Testing

Frequency Ranges Covered:

- Up to 1 GHz
- 1–6 GHz
- Above 6 GHz

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End Users Covered:

- Automotive
- Consumer Electronics
- Telecommunications
- Aerospace & Defense
- Medical Devices
- Industrial Equipment
- IT & Data Centers
- Energy & Utilities
- Other End Users

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy

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- France
- Spain
- Rest of Europe

Asia Pacific

- Japan
- China
- India
- Australia
- New Zealand
- South Korea
- Rest of Asia Pacific

South America

- Argentina
- Brazil
- Chile
- Rest of South America

Middle East & Africa

- Saudi Arabia
- UAE
- Qatar

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South Africa

Rest of Middle East & Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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