

Piezoelectric Devices Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Product (Sensors, Actuator, Motor, Generator, Transducer, Transformers, Resonator), By Material (Polymer, Crystal, Ceramic, Composites), By Element (Discs, Rings, Plates), By End User (Automotive, Healthcare, IT & Telecom, Consumer Goods, Aerospace & Defense, and Others) , By Region, By Competition Forecast & Opportunities, 2018-2028

<https://marketpublishers.com/r/PA15F63DB885EN.html>

Date: October 2023

Pages: 172

Price: US\$ 4,500.00 (Single User License)

ID: PA15F63DB885EN

Abstracts

The Global Piezoelectric Devices Market, valued at USD 30.87 billion in 2022, is experiencing robust growth with a CAGR of 7.50% expected during the forecast period. Piezoelectric Devices have emerged as a transformative force, revolutionizing a multitude of industries and driving the digital revolution in machinery and equipment. These intricate strands of technological connectivity serve as the foundation for creating digital replicas of industrial assets, ushering in an era of enhanced control, optimization, and predictive maintenance.

The substantial growth of the Global Piezoelectric Devices Market is underpinned by a convergence of influential factors. A paramount driver spurring the demand for Piezoelectric Devices lies in the relentless pursuit of cost optimization and heightened operational efficiency across industrial processes. Industries spanning from manufacturing to agriculture are fervently exploring innovative avenues to streamline their operations and reduce downtime. The deployment of Machinery Condition Monitoring Systems (MCS) technology empowers organizations to digitally replicate their machines and equipment, providing them with the ability to monitor performance,

detect latent issues, and proactively prevent catastrophic breakdowns.

The integration of MCS technology is on a rapid ascent, primarily driven by the influx of data generated by an extensive network of sensors, IoT devices, and industrial machinery. These data streams offer a wealth of invaluable insights into machinery performance, paving the way for data-driven decision-making and the strategic implementation of predictive maintenance strategies. As a result, the adoption of Piezoelectric Devices is steadily increasing across diverse sectors, including manufacturing, construction, agriculture, and mining.

Furthermore, the enthusiastic reception of Piezoelectric Devices by industry experts and leaders bolsters its market prospects. Experienced professionals in various sectors readily recognize the transformative potential of MCS technology, envisioning it as a conduit to elevate operational efficiency, enhance safety standards, and boost overall productivity. This positive sentiment has led to a surge in investments in Piezoelectric Devices, with a collective commitment to revolutionizing traditional industries and propelling them into an era of innovation.

One remarkable aspect of MCS technology is its adaptability to craft tailored solutions for specific industries. For instance, in the construction sector, Piezoelectric Devices enable the creation of digital replicas of construction sites and machinery. This precision engineering facilitates precise tasks such as grading, excavation, and construction processes, resulting in increased project efficiency and elevated quality standards.

In conclusion, the Global Piezoelectric Devices Market is positioned for remarkable growth, driven by the relentless pursuit of cost optimization, operational excellence, and the unwavering confidence of industry experts. As industries continue their determined journey toward digital transformation, Piezoelectric Devices stands as a critical linchpin, meticulously shaping the future landscape of machinery operations and industrial processes. The luminous potential of Piezoelectric Devices serves as a guiding beacon for industries worldwide, illuminating the path to an era of unprecedented efficiency and innovation.

Key Market Drivers

Advancements in Sensor Technologies

Advancements in sensor technologies are serving as a powerful catalyst for the rapid growth of the global piezoelectric devices market. Piezoelectric devices are materials

that generate an electric charge when mechanical stress or pressure is applied to them and, conversely, deform when an electric field is applied. These devices have found a wide range of applications across various industries, and recent developments in sensor technologies have further expanded their utility. One of the primary factors driving the piezoelectric devices market is the increasing demand for high-performance sensors with enhanced sensitivity and precision. Advancements in sensor technologies have led to the development of piezoelectric sensors that offer exceptional accuracy in measuring various physical parameters such as pressure, force, acceleration, and strain. These sensors are critical components in applications like automotive systems, industrial machinery, healthcare devices, and consumer electronics, where precise measurements are essential for safety, efficiency, and functionality. Furthermore, miniaturization and integration capabilities have been significantly improved in piezoelectric sensor technologies. Miniaturized piezoelectric sensors can be embedded into compact and portable devices, making them suitable for wearable health monitoring gadgets, IoT devices, and smartphones. Their ability to provide high-quality data in real-time has opened up new possibilities in fields like healthcare, sports analytics, and environmental monitoring. Another driving force is the increasing emphasis on energy harvesting and sustainability. Piezoelectric materials can convert mechanical vibrations and movements into electrical energy, making them ideal for energy harvesting applications. Recent advancements have resulted in more efficient and durable piezoelectric energy harvesters, which are being deployed in various sectors to power remote sensors, wireless sensor networks, and even low-power electronics. These developments contribute to reducing the environmental impact of batteries and extending the lifespan of autonomous devices. Additionally, the piezoelectric devices market is benefiting from innovations in manufacturing processes. Improved fabrication techniques enable the production of cost-effective, high-quality piezoelectric devices at scale. This has made piezoelectric sensors and actuators more accessible to a broader range of industries, including automotive, aerospace, and consumer electronics, where cost-efficiency is paramount. In the healthcare sector, advanced piezoelectric sensors are being used in medical imaging equipment like ultrasound machines, providing clearer and more detailed images for diagnostic purposes. The ability to capture high-resolution images with minimal invasiveness is driving the adoption of piezoelectric technology in the medical field. Moreover, the emergence of 5G technology and the demand for high-frequency, high-speed communication systems have spurred innovations in piezoelectric materials for use in high-frequency filters and resonators. These components are essential for ensuring the reliability and performance of 5G networks and other advanced wireless communication systems.

In conclusion, advancements in sensor technologies have propelled the global

piezoelectric devices market to new heights by enhancing sensitivity, miniaturization, energy harvesting capabilities, and manufacturing efficiency. These improvements have led to the widespread adoption of piezoelectric sensors and actuators across a wide range of applications, including healthcare, consumer electronics, industrial automation, and telecommunications. As the world becomes increasingly reliant on precise and efficient sensor technologies, the demand for piezoelectric devices is expected to continue its upward trajectory, driving further innovation and growth in this dynamic market..

Growth of Energy Harvesting Technologies:

The global piezoelectric devices market is experiencing robust growth, largely propelled by the expanding adoption of energy harvesting technologies. Piezoelectric devices, which generate electrical energy from mechanical vibrations and strain, have become pivotal components in the realm of energy harvesting due to their efficiency and versatility. This surge in the demand for energy harvesting solutions has been a significant driver for the piezoelectric devices market.

One of the primary drivers of this growth is the increasing emphasis on sustainability and energy efficiency. As the world seeks to reduce its reliance on fossil fuels and combat climate change, the need for alternative and renewable energy sources has intensified. Piezoelectric energy harvesting presents a compelling solution by harnessing ambient vibrations and mechanical movements, converting them into usable electrical energy. These energy harvesters find applications in various sectors, including industrial automation, transportation, building automation, and even consumer electronics, where they power low-energy devices and sensors. The ability to generate power from the environment not only reduces the environmental footprint but also extends the lifespan of battery-operated devices, resulting in cost savings and convenience.

Moreover, advancements in piezoelectric materials and engineering have led to more efficient and reliable energy harvesting solutions. Researchers and engineers have developed piezoelectric materials that exhibit enhanced sensitivity and durability, allowing energy harvesters to capture energy from a broader range of mechanical sources and operate in diverse environments. This increased efficiency has made piezoelectric energy harvesting a viable option for remote and autonomous systems, such as wireless sensor networks, IoT devices, and structural health monitoring systems.

The growth of IoT (Internet of Things) technologies has further fueled the demand for energy harvesting solutions, with piezoelectric devices at the forefront. IoT devices are often deployed in locations where changing batteries or providing a continuous power source is challenging. Piezoelectric energy harvesters can serve as a reliable and maintenance-free power source for these devices, enabling long-term, autonomous operation. This is particularly valuable in applications like smart agriculture, environmental monitoring, and asset tracking, where IoT sensors need to be distributed over large and remote areas. Furthermore, industries like automotive and aerospace are increasingly integrating piezoelectric energy harvesting systems into their designs. In automotive applications, these systems can capture energy from vehicle vibrations and convert it into electrical power to charge auxiliary devices or supplement the vehicle's electrical system. In aerospace, piezoelectric energy harvesting can be employed to power sensors and avionics systems in aircraft, reducing the need for heavy and maintenance-intensive batteries. The piezoelectric devices market also benefits from advancements in manufacturing techniques, which have resulted in cost-effective and scalable production. This has made piezoelectric energy harvesters more accessible to a broader range of industries and applications. As the manufacturing process becomes more streamlined, the cost of these devices decreases, making them an attractive option for various businesses and sectors seeking sustainable energy solutions. In conclusion, the global piezoelectric devices market is experiencing significant growth driven by the expansion of energy harvesting technologies. The capacity of piezoelectric devices to efficiently capture and convert mechanical energy into electricity aligns with the global push for sustainability and energy efficiency. These devices find application across a wide range of sectors, including IoT, automotive, aerospace, and industrial automation, and their continued development and integration are set to play a pivotal role in shaping the future of sustainable energy solutions and powering the devices of tomorrow..

Miniaturization and Integration Trends:

Miniaturization and integration trends are driving the adoption of piezoelectric devices across industries. The ability to create compact, high-performance sensors and actuators is opening new possibilities in fields where space constraints and precision are critical. In consumer electronics, the trend toward smaller, more portable devices has created a demand for miniaturized piezoelectric components. These components are used in smartphones for haptic feedback, touchscreens, and fingerprint recognition. Additionally, miniature piezoelectric motors are employed in camera autofocus systems and wearables.

In the realm of microfluidics and lab-on-a-chip technologies, piezoelectric actuators enable precise fluid control and sample manipulation. These applications are vital in fields such as medical diagnostics, drug discovery, and analytical chemistry, where accuracy and automation are paramount. Piezoelectric devices find extensive use in robotics and precision manufacturing. Piezoelectric actuators provide nanoscale positioning and motion control, making them ideal for applications like semiconductor manufacturing, optical alignment, and atomic force microscopy. In conclusion, the Global Piezoelectric Devices Market is being propelled by advancements in sensor technologies, the growth of energy harvesting technologies, and miniaturization and integration trends. These driving factors are not only transforming industries but also unlocking new opportunities for innovation and efficiency. As piezoelectric devices continue to evolve and find novel applications, their impact on diverse sectors is poised to be profound, shaping the future of technology and automation.

Key Market Challenges

Material Limitations and Performance Trade-offs::

In the global piezoelectric devices market, one of the prominent challenges that both manufacturers and researchers face is navigating material limitations and the inevitable performance trade-offs associated with piezoelectric technology. Piezoelectric devices, which convert mechanical stress or vibrations into electrical energy and vice versa, rely heavily on the properties of piezoelectric materials like crystals, ceramics, and polymers. While these materials offer unique advantages, they also present inherent limitations that impact device performance and design. Material limitations pose a significant challenge in terms of efficiency and effectiveness. For instance, the choice of piezoelectric material greatly influences the device's performance characteristics, such as sensitivity, energy conversion efficiency, and frequency response. Different materials have distinct piezoelectric properties, and selecting the most suitable material for a specific application often requires trade-offs. Crystalline materials like quartz are highly sensitive and stable, making them ideal for precise timing applications in electronics. However, they can be expensive and less adaptable to certain mechanical deformations. On the other hand, ceramic materials are more versatile and cost-effective but may lack the sensitivity required for some applications. Another material-related challenge is the limited strain or displacement that piezoelectric materials can endure before experiencing material fatigue or failure. Excessive mechanical stress can lead to reduced device reliability and a shorter lifespan, limiting the long-term viability of piezoelectric solutions in certain high-stress environments. Researchers are continuously working on developing materials with improved mechanical properties to

address these limitations, but such advancements are often accompanied by trade-offs in other performance aspects. Performance trade-offs are a fundamental challenge in the piezoelectric devices market. As designers aim to optimize various device parameters such as size, sensitivity, and power output, they often find themselves making trade-offs in one area to achieve improvements in another. For example, enhancing the sensitivity of a piezoelectric sensor may necessitate a larger physical size, which can be impractical for compact and portable applications. Conversely, reducing the device's size may compromise sensitivity, affecting its ability to generate or detect electrical signals accurately. Moreover, there's a trade-off between energy conversion efficiency and bandwidth or frequency response in piezoelectric devices. Devices designed for high energy conversion efficiency tend to have a limited bandwidth and may not be suitable for applications requiring rapid mechanical vibrations or dynamic responses. Conversely, devices optimized for high-frequency response may sacrifice some energy conversion efficiency. Environmental factors can also impact piezoelectric device performance. Temperature sensitivity is a common limitation, as piezoelectric materials often exhibit variations in their electrical and mechanical properties with temperature changes. This can lead to inaccuracies in measurements or fluctuations in energy harvesting capabilities. To address these challenges, ongoing research efforts are focused on the development of advanced piezoelectric materials, novel device designs, and innovative integration techniques. Multifunctional materials and composites are being explored to enhance performance while mitigating limitations. Additionally, new manufacturing processes and materials engineering techniques aim to achieve a balance between conflicting device attributes. In conclusion, material limitations and performance trade-offs are inherent challenges in the global piezoelectric devices market. Achieving the desired combination of sensitivity, energy conversion efficiency, size, and reliability often requires careful consideration of material selection and trade-offs in device design. As technology advances and research continues, it is expected that these challenges will be gradually addressed, unlocking new opportunities for piezoelectric devices in a wide range of applications, from energy harvesting to sensors and beyond.

Environmental and Sustainability Concerns

In the global piezoelectric devices market, one of the prominent challenges arises from environmental and sustainability concerns associated with the production, use, and disposal of these devices. While piezoelectric technology offers numerous advantages, including energy efficiency and versatility, it is not immune to the environmental impact that comes with the extraction of raw materials, manufacturing processes, and end-of-life disposal. Addressing these concerns has become increasingly important as

industries and consumers prioritize sustainability and eco-friendliness in their choices.

One significant environmental challenge in the piezoelectric devices market stems from the extraction and processing of piezoelectric materials, particularly piezoelectric ceramics. These materials often contain rare or precious elements, including lead, which has been commonly used in various piezoelectric applications due to its desirable properties. However, the extraction and processing of these materials can lead to environmental degradation and health hazards, especially when it involves hazardous substances like lead. As a result, there is a growing push for the development and adoption of lead-free piezoelectric materials to reduce environmental and health risks associated with their production.

Furthermore, the manufacturing processes involved in creating piezoelectric devices, such as sensors, transducers, and actuators, can consume significant energy and resources. Energy-intensive processes, coupled with the need for specialized equipment, can contribute to a substantial carbon footprint. Reducing the environmental impact of manufacturing piezoelectric devices requires innovative approaches to improve energy efficiency and minimize waste generation. Sustainable manufacturing practices, such as lean production and the use of green materials, are increasingly being explored by manufacturers to mitigate these challenges. Another concern lies in the potential electronic waste (e-waste) generated by piezoelectric devices at the end of their lifecycle. As the adoption of piezoelectric technology grows across various industries, the disposal of these devices becomes a critical issue. Improper disposal practices can lead to environmental contamination and health risks due to the presence of hazardous materials in some piezoelectric components. Recycling and responsible disposal methods for piezoelectric devices are essential to minimize their environmental impact and ensure compliance with environmental regulations.

Additionally, the performance and durability of piezoelectric devices can be affected by environmental factors such as temperature, humidity, and exposure to chemicals. Environmental conditions can lead to premature device failure or reduced efficiency, which may require more frequent replacements or maintenance. This not only increases the overall environmental footprint but also poses economic challenges for users and industries relying on these devices..

Key Market Trends

Miniaturization and Nanotechnology Integration

One of the most prominent trends in the Global Piezoelectric Devices Market is the relentless drive towards miniaturization and integration, facilitated by advancements in nanotechnology. Piezoelectric devices, which were traditionally known for their ability to generate and sense mechanical vibrations, have undergone a dramatic transformation. This trend is driven by the growing demand for smaller, more compact devices in applications ranging from consumer electronics to medical devices and beyond. In the realm of consumer electronics, the demand for thinner and lighter devices has led to the integration of piezoelectric components in smartphones, tablets, and wearables. Piezoelectric actuators are used for haptic feedback, allowing users to experience tactile sensations like vibrations and clicks. These actuators are exceptionally compact, making them ideal for the limited space available in modern gadgets. Miniaturization is particularly crucial in healthcare and medical devices, where precision and non-invasiveness are paramount. Piezoelectric sensors and transducers are now being integrated into portable diagnostic tools, medical imaging devices, and even implantable medical devices. Their compact size and exceptional sensitivity enable accurate measurements and monitoring without invasive procedures. In scientific and research fields, the integration of piezoelectric actuators and sensors into microfluidic devices and lab-on-a-chip systems is revolutionizing experimentation. Researchers can precisely control fluid flow, manipulate particles, and perform chemical analyses on a miniature scale, leading to advancements in areas such as drug discovery and point-of-care diagnostics. Miniaturized piezoelectric actuators are finding extensive use in precision manufacturing and robotics. These devices provide nanoscale positioning and motion control, enabling highly accurate processes in semiconductor fabrication, optical alignment, and materials testing.

Energy Harvesting and Sustainable Power Sources:

Another significant trend in the Global Piezoelectric Devices Market is the exploration of energy harvesting technologies. Piezoelectric materials, renowned for their ability to convert mechanical energy into electrical energy, are at the forefront of sustainable power generation. This trend aligns with the global shift towards renewable energy sources and eco-friendly solutions. Energy harvesting using piezoelectric devices is gaining traction in wireless sensor networks. Sensors placed in remote or inaccessible locations can scavenge energy from vibrations, motion, or ambient mechanical sources to power themselves. This eliminates the need for frequent battery replacements and reduces the environmental impact. Wearable electronics and Internet of Things (IoT) devices are increasingly incorporating piezoelectric energy harvesting solutions. These devices can extend battery life or operate autonomously by harnessing ambient energy. For example, piezoelectric materials can generate power from body motion, enabling

self-powered wearable health monitors and IoT sensors. Piezoelectric energy harvesting extends beyond small-scale applications. Researchers are exploring large-scale deployments in renewable energy generation. Piezoelectric materials can capture energy from sources such as wind, ocean waves, and foot traffic. These materials offer a renewable and sustainable approach to power generation, contributing to green energy initiatives..

Segmental Insights

The market for piezoelectric motor segment to grow at the significant CAGR during the forecast period. A piezoelectric motor is a device that creates motion when a piezoelectric material modifies its shape due to the electric field. A piezoelectric motor works with the inverse piezoelectric effect, where electrical energy is continuously converted into mechanical energy as the rotor rotates. In piezoelectric motors, a piezoelectric ceramic element receives an electrical signal and then applies a directed force to the opposite ceramic plate, resulting in rotor movement in the desired direction. The market share of piezoelectric motors is significant.

Regional Insights

Asia Pacific is the fastest growing market. The Asia-Pacific region has emerged as a manufacturing hub for electronics and consumer goods as China, Japan, Taiwan, India and South Korea focus on increasing their manufacturing capacity. Governments in the Asia-Pacific region are offering tax breaks and incentives to electronics manufacturers setting up new manufacturing facilities in the region following the slowdown caused by COVID-19, thereby seeking to expand the market size over the forecast period. North America offers growth opportunities for the market as the US plans extensive space exploration programs that use piezoelectric materials to detect targets in space and remotely control spacecraft components. The European auto industry is expected to recover from the slowdown caused by the corona pandemic. Research into driverless automated cars is also expanding in the region and bringing excitement to the market..

Key Market Players

PI Ceramics GmbH

APC INTERNATIONAL, LTD

CTS Corporation

L3Harris Technologies, Inc.

CeramTec

ARKEMA

Solvay

Mad City Labs, Inc.

Piezosystem jena GmbH

Sparkler Ceramics

Report Scope:

In this report, the Global Piezoelectric Devices Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global Piezoelectric Devices Market, By Product:

Sensors

Actuator

Motor

Generator

Transduce

Transformers

Resonator

Global Piezoelectric Devices Market, By Element:

Discs

Rings

Plates

Global Piezoelectric Devices Market, By Material:

Polymer

Crystal

Ceramic

Composites

Global Piezoelectric Devices Market, By End User:

Automotive

Healthcare

IT & Telecom

Consumer Goods

Aerospace & Defense

Others

Global Piezoelectric Devices Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Piezoelectric Devices Market.

Available Customizations:

Global Piezoelectric Devices Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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10.3.3.2. Market Share & Forecast

10.3.3.2.1. By Product

10.3.3.2.2. By Material

10.3.3.2.3. By Element

10.3.3.2.4. By End User

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11.1. Drivers

11.2. Challenge

12. MARKET TRENDS & DEVELOPMENTS

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13.1.1. Business Overview

13.1.2. Key Revenue and Financials

13.1.3. Recent Developments

13.1.4. Key Personnel

13.1.5. Key Product/Services

13.2. APC INTERNATIONAL, LTD

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13.2.3. Recent Developments

13.2.4. Key Personnel

13.2.5. Key Product/Services

13.3. Sparkler Ceramics ; CTS Corporation

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13.9.5. Key Product/Services

13.10. Sparkler Ceramics

13.10.1. Business Overview

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13.10.3. Recent Developments

13.10.4. Key Personnel

13.10.5. Key Product/Services

14. STRATEGIC RECOMMENDATIONS

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