

Navian Marketing Report

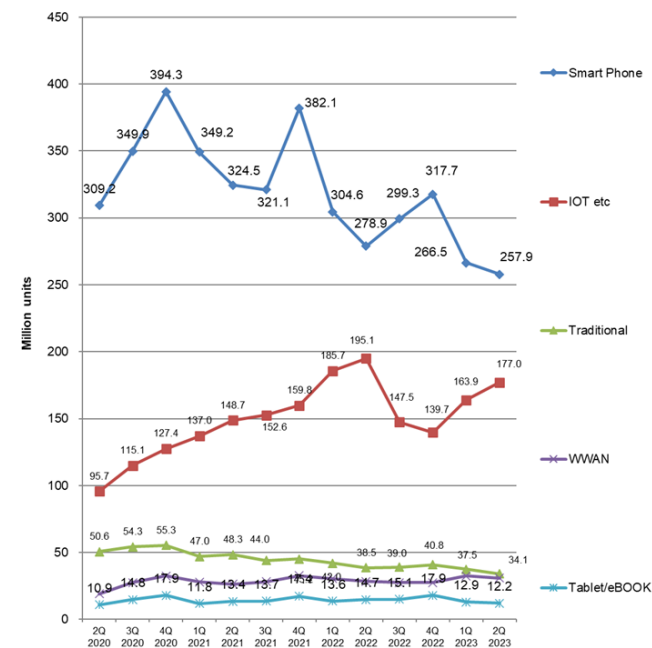
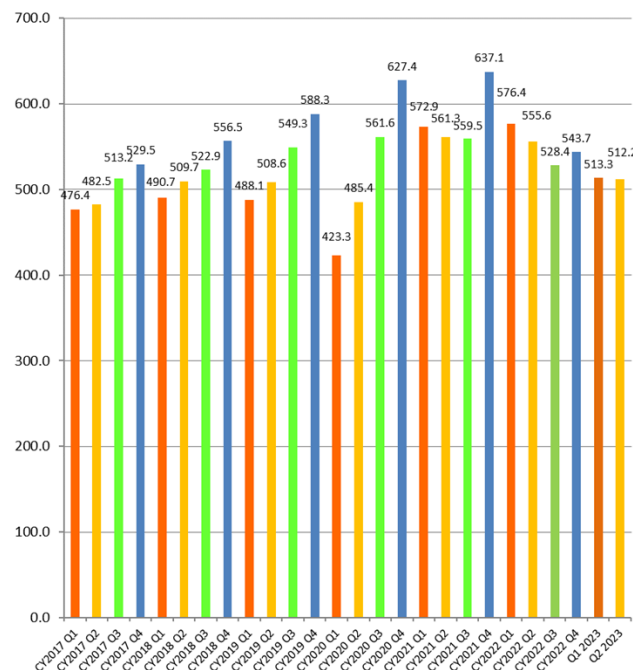
RF Devices/Modules For Cellular Terminal Quarterly Market Report Q2 2023

2023 年 11 月 10 日 発刊

本レポートで対象とする Cellular Terminal 用高周波部品・モジュール

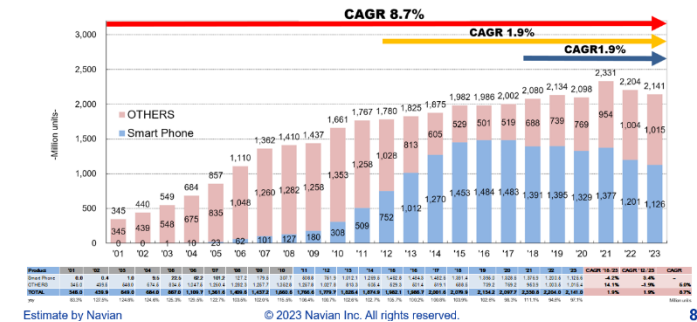
- ① Front end Module (ASM・TX Module・PAiD・FEMiD・All-in-One FEM・PAMiD・**5G TX Module/PAMiF-NEW**・ Multiplexer・A-Multiplexer・**5G RX Module-NEW**)
- ② Antenna Switch (Main RF/Diversity) Power Amplifier Module
- ④ Duplexer
- ⑤ Band Pass Filter
- ⑥ TCXO

Cellular Terminal の製品タイプ別及び規格別出荷構成比 四半期推移

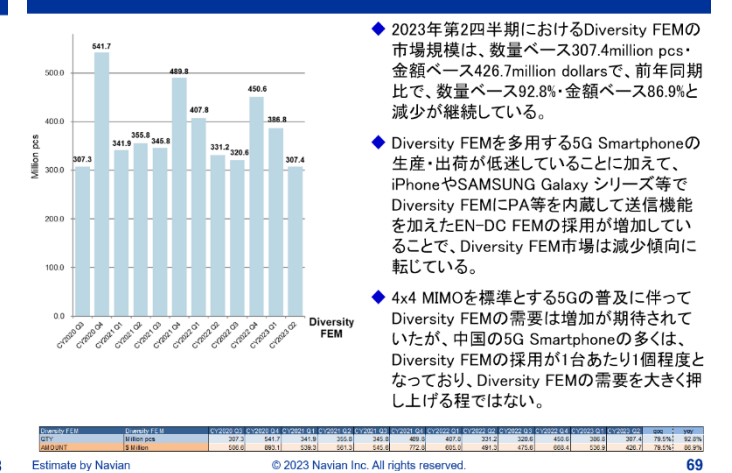


Cellular Terminal Annual Shipment History CY2001-CY2023

- ◆ 2022年のCellular Terminalの出荷台数は、前年比94.6%の2,204.0million unitsとなった。
- ◆ 中国を中心にSmartphoneの需要の落ち込みは深刻化しており、加えて好調だったCellular IOTも2022年後半に入って大きく失速した。
- ◆ 2023年に入ってもゼロコロナ解除後の中国は期待されたほどの景気回復が見られず、世界的なインフレ進行による景気減速懸念も強まっており、年初に見込まれた2023年後半の需要回復も期待できそうにない。
- ◆ 2023年のCellular Terminalの出荷台数は、前年比97.1%の2,141.0million unitsと2年連続の減少となりそうだ。



2Q 2023: Diversity FEM Market Size

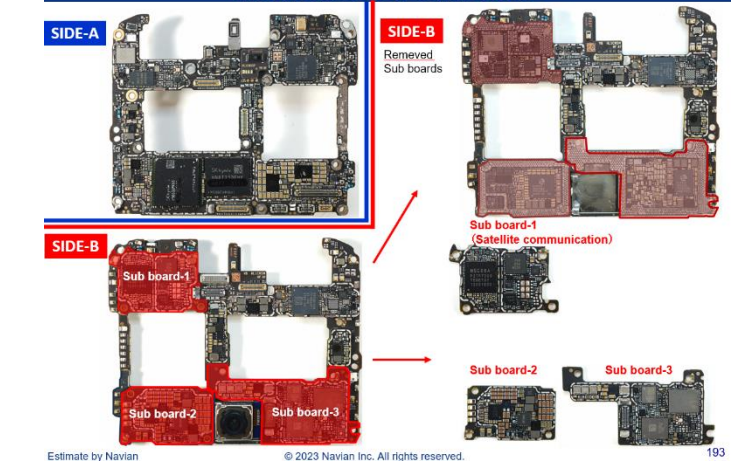


- ◆ 2023年第2四半期におけるDiversity FEMの市場規模は、数量ベース307.4million pcs・金額ベース426.7million dollarsで、前年同期比で、数量ベース92.8%・金額ベース86.9%と減少が継続している。
- ◆ Diversity FEMを多用する5G Smartphoneの生産・出荷が低迷していることに加えて、iPhoneやSAMSUNG Galaxy シリーズ等でDiversity FEMにPA等を内蔵して送信機能を加えたEN-DC FEMの採用が増加していることで、Diversity FEM市場は減少傾向に転じている。
- ◆ 4x4 MIMOを標準とする5Gの普及に伴ってDiversity FEMの需要は増加が期待されていたが、中国の5G Smartphoneの多くは、Diversity FEMの採用が1台あたり1個程度となっており、Diversity FEMの需要を大きく押し上げる程ではない。

PAMiD Supply chain

Smartphones	High-band	Mid-band	Low-band	Local-band	Integrated Multiplexer	Release date
GALAXY S20-S20A-S20neo	Qualcomm Medium-high band	Qualcomm	Skyworks	-	19.7.20/60/70 Headset	2020 June
Phone12 Pro	Qualcomm Medium-high band	Qualcomm	Skyworks	Skyworks	19.7.20/60/70 Headset	2020 October
Xiaomi Redmi Note 9T 5G	Qualcomm Medium-high band	Qualcomm	Skyworks	Skyworks	19.7.20/60/70 Headset	2021 January
GALAXY S21-S21E-S21 FE	Qualcomm Medium-high band	Qualcomm	Skyworks	-	19.7.20/60/70 Headset	2021 April
GALAXY A52 5G	Qualcomm Medium-high band	Qualcomm	Skyworks	-	19.7.20/60/70 Headset	2021 March
SAI-A520	Qualcomm Medium-high band	Qualcomm	Skyworks	-	19.7.20/60/70 Headset	2021 March
OPPO Reno6 Pro 5G	Qualcomm Medium-high band	Qualcomm	Skyworks	-	19.7.20/60/70 Headset	2021 June
OPPO Reno6 5G	Qualcomm Medium-high band	Qualcomm	Skyworks	-	19.7.20/60/70 Headset	2021 June
Xiaomi Mi 11 5G	Qualcomm Medium-high band	Qualcomm	Skyworks	-	19.7.20/60/70 Headset	2021 July
Phone13	Qualcomm Medium-high band	Qualcomm	Skyworks	-	19.7.20/60/70 Headset	2021 September
Google Pixel 6 5G	Qualcomm Medium-high band	Qualcomm	Skyworks	-	19.7.20/60/70 Headset	2021 October
OnePlus 9 Pro 5G	Qualcomm Medium-high band	Qualcomm	Skyworks	-	19.7.20/60/70 Headset	2021 October
TWOW 17S 5G Module	Qualcomm Medium-high band	Qualcomm	Skyworks	-	19.7.20/60/70 Headset	2021 March
RM500Q-L	Qualcomm Medium-high band	Qualcomm	Skyworks	-	19.7.20/60/70 Headset	N/A
Qualcomm RM500-L	Qualcomm Medium-high band	Qualcomm	Skyworks	-	19.7.20/60/70 Headset	N/A
Finisar RM500-L	Qualcomm Medium-high band	Qualcomm	Skyworks	-	19.7.20/60/70 Headset	N/A
SAMSUNG Galaxy S22 5G 5G	Qualcomm Medium-high band	Qualcomm	Skyworks	-	19.7.20/60/70 Headset	2022 April
Phone14	Qualcomm Medium-high band	Qualcomm	Skyworks	-	19.7.20/60/70 Headset	2022 September
Xiaomi Redmi Note 12 Pro 5G	Qualcomm Medium-high band	Qualcomm	Skyworks	-	19.7.20/60/70 Headset	2022 November
Xiaomi Redmi Note 12 Pro 5G	Qualcomm Medium-high band	Qualcomm	Skyworks	-	19.7.20/60/70 Headset	2022 November
OPPO Find X6	Qualcomm Medium-high band	Qualcomm	Skyworks	-	19.7.20/60/70 Headset	2023 January
SAMSUNG Galaxy S23 5G 5G	Qualcomm Medium-high band	Qualcomm	Skyworks	-	19.7.20/60/70 Headset	2023 March
Huawei Mate40 pro	Qualcomm Medium-high band	Qualcomm	Skyworks	-	19.7.20/60/70 Headset	2023 April
Phone15	Qualcomm Medium-high band	Qualcomm	Skyworks	-	19.7.20/60/70 Headset	2023 September

HUAWEI MATE 60 Pro Motherboard Structure



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●内容等のお問い合わせは下記担当まで、お気軽にお申し付けください。

■資料発刊要領

RF Devices/Modules For Cellular TerminalQuarterly Market Report Q2 2023 -CD-ROM (PDF file)-

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e-Book Reader Tablet PC



Tablet PC



WWAN Terminal

Adapter



Embedded Module



Smart Phone



Traditional Handset

Mobile Phone



Fixed Wireless Terminal



Non-Voice

Voice

PHASE 1. CELLULAR TERMINAL SHIPMENT
AND UPDATE

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 - (4) Front End Module Market Size & Trend by Product
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 - (2) Main RF Parts list & Duplexer/BPF Count
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 - (2) Main RF Parts list & Duplexer/BPF Count
 - (3) Teardown pictures & RF Modules/Components

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- 「RF Devices/Modules For Cellular Terminal Quarterly Market Report」
を下記の通り申し込みます。

Report Title		価格	数量
■ RF Devices/Modules For Cellular Terminal Quarterly Market Report Q2 2023 -CD-ROM-		172,500 円(消費税別)	
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