

5G Chipset Market Report by Chipset Type (Application-Specific Integrated Circuits (ASIC), Radio Frequency Integrated Circuit (RFIC), Millimeter Wave Technology Chips, Field-Programmable Gate Array (FPGA)), Operational Frequency (Sub 6 GHz, Between 26 and 39 Ghz, Above 39 Ghz), End User (Consumer Electronics, Industrial Automation, Automotive and Transportation, Energy and Utilities, Healthcare, Retail, and Others), and Region 2024-2032

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Abstracts

The global 5G chipset market size reached US\$ 6.0 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 78.3 Billion by 2032, exhibiting a growth rate (CAGR) of 31.5% during 2024-2032. The market is experiencing steady growth driven by the escalating demand for high-speed internet and advanced data services across various sectors, the widespread adoption of IoT devices, and substantial investments and supportive government policies for 5G network deployment.

Global 5G Chipset Market Analysis:

Major Market Drivers: The escalating demand for high-speed internet and advanced data services is primarily driving the growth of the market. In addition to this, the widespread adoption of IoT devices, smart city initiatives, and the acceleration of industrial automation is also contributing to the market growth.

Key Market Trends: The growing trend towards the integration of 5G chipsets in consumer electronics, particularly smartphones, and in commercial sectors for IoT and industrial automation is augmenting the market growth. Moreover, the introduction of energy-efficient and cost-effective chipset solutions is creating a positive outlook for the

future of the 5G chipset market.

Geographical Trends: The Asia-Pacific region, particularly countries such as China and South Korea, holds the largest 5G chipset market share due to rapid network deployment and government support. This region has been at the forefront of 5G deployment, with extensive network rollouts and a high adoption rate of 5G-enabled devices.

Competitive Landscape: Some of the leading players in the global 5G chipset industry include Broadcom Inc., Huawei Technologies Co., Ltd., Infineon Technologies Ag, Intel Corporation, Mediatek Inc., Nokia Corporation, Qorvo, Qualcomm Technologies, Inc., Samsung Electronics Co. Ltd., Xilinx Inc, among others.

Challenges and Opportunities: The market faces challenges, such as high infrastructure costs and the need for standardization across regions. However, these challenges present opportunities for innovation in cost-effective solutions and the development of universal standards to foster global market expansion. Government initiatives in various countries offer substantial opportunities for market growth through investments and supportive policies.

Global 5G Chipset Market Trends:

Increasing Demand for High-Speed Internet and Data Services

The global market is significantly driven by the escalating demand for high-speed internet and advanced data services. Furthermore, the proliferation of IoT devices, smart cities, and industrial automation is also augmenting the need for 5G chipsets. Several smart city projects and initiatives are underway around the world, and it is expected that by 2025, there will be around 30 global smart cities, with half of these located in North America and Europe. These steps are supported by global investments, which, according to the OECD, are expected to total US\$ 1.8 Trillion in urban infrastructure projects between 2010 and 2030. This, in turn, is driving the demand for 5G chipsets for smart city connectivity applications. Moreover, the rapid expansion of mobile networks and increasing smartphone penetration are contributing to this trend. The global number of smartphone users was forecast to continuously increase between 2024 and 2029 by, in total, 1.5 billion users (+30.6 %). After the fifteenth consecutive increasing year, the smartphone user base is estimated to reach 6.4 billion users and, therefore, a new peak in 2029. Furthermore, the growing appetite for streaming services, online gaming, and real-time data access necessitates robust and fast connectivity solutions, which they can provide.

Technological Advancements in Semiconductor and Telecommunication Industries

Ongoing technological advancements in the semiconductor and telecommunication sectors are also propelling the growth of the market. Continuous innovation in chipset design, including the development of smaller, more efficient, and cost-effective components, is creating a positive outlook for the overall market. Additionally, various telecom operators are acquiring spectrums to increase their 5G connection coverage. For instance, in August 2022, in India's first 5G spectrum auction, Airtel paid INR 43,084 crore for 19,800 MHz spectrum. In the past 20 years, spectrum bands 900 MHz, 2100 MHz, 1800 MHz, 3300 MHz, and 26 GHz have been acquired through auctions. It obtained a pan-India footprint in the 3.5 GHz and 26 GHz bands. According to the company, this is the ideal spectrum bank for the best 5G experience, with 100x capacity enhancement done strategically at the lowest cost. Moreover, various key market players are also collaborating with each other to improve 5G infrastructure. For example, ABB and Ericsson collaborated to realize Thailand's Industry 4.0 ambition and facilitate future flexible production with automation systems and wireless communications. The focus areas include ABB's Robotics & Discrete Automation, Industrial Automation, and Motion business areas and ABB Ability TM Platform Services. The collaboration covers 5G-enabled Augmented Reality Lenses for remote commissioning in manufacturing environments in addition to global NB-IoT connected motors and drives through Ericsson Communication Service Provider partners and its IoT-Accelerator platform. Furthermore, advances in semiconductor technology, such as the transition to smaller nanometre process nodes, are enhancing their performance and energy efficiency, which is anticipated to propel the 5G chipset market growth.

Government Initiatives and Investment in 5G Infrastructure

Government policies and investments are playing a pivotal role in driving the market growth. Numerous countries are actively promoting the deployment of 5G networks as part of their digital transformation agendas, providing financial and regulatory support to accelerate this process. For instance, according to IBEF data, the Government of India has set an ambitious target of increasing manufacturing output contribution to GDP to 25% by 2025, up from 16%. The Smart Advanced Manufacturing and Rapid Transformation Hub (SAMARTH) Udyog Bharat 4.0 initiative aims to raise awareness of Industry 4.0 in the Indian manufacturing industry and assist stakeholders in addressing smart manufacturing challenges. Furthermore, governments are facilitating the allocation of 5G spectrum bands, crucial for the efficient operation of 5G networks and, by extension, the performance of 5G chipsets.

5G Chipset Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market,

along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on chipset type, operational frequency, and end user.

Breakup by Chipset Type:

Application-specific Integrated Circuits (ASIC)

Radio Frequency Integrated Circuit (RFIC)

Millimeter Wave Technology Chips

Field-programmable Gate Array (FPGA)

Application-specific integrated circuits (ASIC) dominate the market

The report has provided a detailed breakup and analysis of the market based on the chipset type. This includes application-specific integrated circuits (ASIC), radio frequency integrated circuits (RFIC), millimeter wave technology chips, and field-programmable gate arrays (FPGA). According to the report, application-specific integrated circuits (ASIC) represented the largest segment.

The ASIC segment holds the largest share of the market. These chips are custom-designed for specific applications, making them highly efficient for dedicated tasks. In the context of 5G, ASICs are predominantly used in network infrastructure and high-performance computing applications where efficiency and speed are critical. Their ability to provide tailored solutions for complex processes, such as signal processing and data handling in 5G networks, makes them a preferred choice. Despite their higher upfront development cost, their optimized performance and lower operational costs in the long term contribute significantly to their market dominance.

Breakup by Operational Frequency:

Sub 6 GHz

Between 26 and 39 Ghz

Above 39 Ghz

Sub 6 GHz holds the largest share in the market

A detailed breakup and analysis of the market based on the operational frequency has also been provided in the report. This includes sub 6 GHz, Between 26 and 39 Ghz, and above 39 GHz. According to the report, sub-6 GHz accounted for the largest market share.

The sub 6 GHz segment is currently the largest in the global market. This frequency range is crucial for providing widespread coverage and better penetration through obstacles, making it ideal for urban and suburban areas. Chipsets operating in this spectrum are fundamental to ensuring broad 5G network accessibility, especially in regions where dense building construction can impede higher frequency signals. These chipsets support a balance between coverage and data rate, making them suitable for a wide array of consumer devices and industrial applications.

Breakup by End User:

- Consumer Electronics
- Industrial Automation
- Automotive and Transportation
- Energy and Utilities
- Healthcare
- Retail
- Others

Consumer electronics hold the largest share of the market

A detailed breakup and analysis of the market based on the end-user have also been provided in the report. This includes consumer electronics, industrial automation, automotive and transportation, energy and utilities, healthcare, retail, and others. According to the report, consumer electronics accounted for the largest market share.

The consumer electronics segment holds the largest share of the market, driven by the rapid adoption of 5G technology in smartphones, tablets, wearables, and smart home devices. According to the Cisco Annual Internet Report, the average smartphone connection speed in the United States was 81.1 Mbps as of 2023, up from 19.2 Mbps in 2018, a 4.2-fold growth (33% CAGR). Alongside 5G rollouts, operators are also pursuing ambitious network transformation strategies. Moreover, numerous consumer electronic operators are increasingly collaborating with 5G providers, which is creating a positive outlook for the overall market. For instance, 18 global telecom and consumer device makers partnered with US-based Qualcomm for their 5G chipset. Such innovations and advancements will continue to cater to the growth of this segment.

Breakup by Region:

North America
United States
Canada
Asia-Pacific
China
Japan
India
South Korea
Australia
Indonesia
Others
Europe
Germany
France
United Kingdom
Italy
Spain
Russia
Others
Latin America
Brazil
Mexico
Others
Middle East and Africa

Asia Pacific leads the market, accounting for the largest 5G chipset market share.

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific accounted for the largest market share.

Asia Pacific (APAC) is the largest segment in the market, primarily driven by rapid technological advancements and strong government support in countries such as China, South Korea, and Japan. This region has been at the forefront of 5G deployment, with extensive network rollouts and a high adoption rate of 5G-enabled devices. Further, South Korea also boasts one of the highest 5G performances in

APAC, exceeded only by Malaysia. The two countries are home to the leading cities in terms of 5G performance, with Seoul having the fastest download speed and Kuala Lumpur the fastest upload speed among major cities in the region. South Korea was the first country worldwide to launch 5G services in April 2019.

Leading Key Players in the 5G Chipset Industry:

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Broadcom Inc
Huawei Technologies Co., Ltd.
Infineon Technologies Ag
Intel Corporation
Mediatek Inc
Nokia Corporation
Qorvo
Qualcomm Technologies, Inc.
Samsung Electronics Co. Ltd.
Xilinx Inc.

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

Global 5G Chipset Market News:

February 2024: Apple extends its agreement with Qualcomm for 5G modem chips until 2027. Qualcomm CEO Cristiano Amon, in an interview with CNBC, has confirmed that Apple has agreed to extend its patent license agreement related to the 5G modem through March 2027.

Nov 2023: MediaTek launched Dimensity 8300 5G chipset with genAI capabilities. The chipset is based on TSMC's second-generation 4nm process and has an octa-core CPU comprising four Arm Cortex-A715 cores and four Cortex-A510 cores built on Arm's v9 CPU architecture. It is paired with the Mali-G615 MC6 GPU. The Dimensity 8300 unlocks new possibilities for the premium smartphone segment, offering users in-hand AI, hyper-realistic entertainment opportunities, and seamless connectivity.

November 2023: Viettel High Tech developed its own 5G chipset. The 5G DFE (digital front end) chip can perform one quadrillion calculations per second.

Key Questions Answered in This Report

1. How large is the 5G chipset market?
2. What is the expected growth rate of the global 5G chipset market during 2024-2032?
3. What are the key 5G chipset market drivers, propelling the market growth?
4. What has been the impact of COVID-19 on the global 5G chipset market?
5. What is the breakup of the global 5G chipset market based on the chipset type?
6. What is the breakup of the global 5G chipset market based on the operational frequency?
7. What is the breakup of the global 5G chipset market based on end user?
8. What are the key regions in the global 5G chipset market?
9. Who are the key players/companies in the global 5G chipset market?

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