

# **GaN Power Device Market by Device Type (Power, RF Power), Voltage Range, Application (Power Drives, Supply & Inverter, and RF), Vertical (Telecommunications, Consumer, Automotive, Military, Defense, Aerospace), and Geography - Global Forecast to 2023**

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## **Abstracts**

“The global GaN power device market is expected to register a CAGR of 29.1% between 2017 and 2023”

The GaN power device market is expected to be worth USD 1890.2 million by 2023 from USD 408.3 million in 2017, at a CAGR of 29.1% between 2017 and 2023. The major factors driving the growth of the GaN power device industry include huge revenue generation from the consumer electronics and automotive verticals, wide bandgap property of GaN material encouraging innovation, success of GaN in RF-power electronics, and increasing adoption of GaN RF power device in military, defense, and aerospace verticals. However, the preference of silicon carbide in high-voltage power devices is expected to be a potential restraint in the overall GaN power device market. This factor is expected to limit the market growth over the next few years.

“RF power device held the largest market share in 2016”

The global GaN power device market for RF power device held the largest share in 2016. In 2016, more than 90% of the total GaN power device market for RF power devices was dominated by the telecommunications; military, defense, and aerospace; and consumer and enterprise verticals. RF power devices are used in the military applications, very small aperture terminal (VSAT), phased-array radar applications,

defense applications, RF cellular infrastructure, jammers, and satellite communications. Initially developed for improvised explosive device (IED) jammers in Iraq, GaN RF power has emerged as the technology of choice for all new microwave and millimeter-wave electronics including radar, satellite, communications, and electronic warfare.

“Market for power drives is expected to witness a significant growth between 2017 and 2023”

The market for GaN-based power drives is expected to grow significantly during the forecast period. This is attributed to its characteristics such as high breakdown voltage and low conduction resistance characteristics that enable high-speed switching and miniaturization. The growing EV charging and electric vehicle production markets, as well as increasing renewable energy generation are the main reasons for the high growth rate of GaN-based power devices. Moreover, there is a huge demand for motor drives due to the high efficiency and performance characteristics offered by GaN devices in high voltage range (above 400 V) applications. GaN power devices are mainly used in UPS and motor control, wireless charging, high-efficiency power supply applications, servo motor drive, and hybrid and EV battery control and health management systems.

“APAC held the largest market share in 2016 and is expected to exhibit considerable growth during the forecast period”

Asia Pacific (APAC) is expected to hold the largest share of the GaN power device market during the forecast period owing to the growing demand for power devices in the industrial, computing, telecommunications, automotive and military, and aerospace and defense verticals in emerging Asian countries such as China, Japan, Taiwan, the Philippines, and India. Moreover, the EV charging and electric vehicle production markets, as well as increasing renewable energy generation are driving the growth of the GaN power device market in APAC.

Break-up of the profiles of primary participants:

By Company Type: Tier 1 – 52%, Tier 2 – 21%, and Tier 3 – 27%

By Designation: C-Level Executives – 67% and Managers – 33%

By Region: North America – 40%, Europe – 18%, Asia Pacific – 27%, and Rest

of the World – 15%

The report includes the competitive landscape of the market for prominent players including Cree (US), Qorvo (US), MACOM (US), Microsemi Corporation (US), Analog Devices US), Efficient Power Conversion (US), Integra Technologies (US), Transphorm (US), Navitas Semiconductor (US), Texas Instruments (US), Sumitomo Electric (Japan), Northrop Grumman Corporation (US), Qromis (US), Polyfet (US), TOSHIBA (Japan), Sumitomo Electric (Japan), Mitsubishi Electric (Japan), Panasonic (Japan), GaN Systems (Canada), VisIC Technologies (Israel), GaNPower (Canada), Infineon (Germany), Exagan (France), Ampleon (Netherlands), and EpiGaN (Belgium).

#### Research Coverage:

This research report categorizes the global GaN power device market on the basis of device type, voltage range, application, vertical, and geography. The report describes the major drivers, restraints, challenges, and opportunities pertaining to the market; value chain analysis; and market ranking analysis.

#### Reasons to Buy the Report

The report would help leaders/new entrants in this market in the following ways:

1. This report segments the GaN power device market comprehensively and provides the closest market size estimation for subsegments across different regions.
2. The report would help stakeholders understand the pulse of the market and provide them the information on key drivers, restraints, challenges, and opportunities for market growth.
3. This report would help stakeholders understand their competitors better and gain insights to improve their position in the business. The competitive landscape section includes the competitor ecosystem, product launches, acquisitions, partnerships, expansions, agreements, contracts, alliances, and collaborations.

## Contents

### 1 INTRODUCTION

- 1.1 OBJECTIVES OF THE STUDY
- 1.2 DEFINITION
- 1.3 STUDY SCOPE
  - 1.3.1 MARKETS COVERED
  - 1.3.2 YEARS CONSIDERED FOR THE STUDY
- 1.4 CURRENCY
- 1.5 LIMITATIONS
- 1.6 STAKEHOLDERS

### 2 RESEARCH METHODOLOGY

- 2.1 RESEARCH DATA
  - 2.1.1 SECONDARY DATA
    - 2.1.1.1 Secondary sources
  - 2.1.2 PRIMARY DATA
    - 2.1.2.1 Primary sources
    - 2.1.2.2 Key industry insights
    - 2.1.2.3 Breakdown of primaries
- 2.2 MARKET SIZE ESTIMATION
  - 2.2.1 BOTTOM-UP APPROACH
  - 2.2.2 TOP-DOWN APPROACH
- 2.3 MARKET BREAKDOWN & DATA TRIANGULATION
- 2.4 RESEARCH ASSUMPTIONS

### 3 EXECUTIVE SUMMARY

### 4 PREMIUM INSIGHTS

- 4.1 ATTRACTIVE OPPORTUNITIES FOR GAN POWER DEVICE MARKET
- 4.2 GAN POWER DEVICE MARKET, BY DEVICE TYPE
- 4.3 GAN POWER DEVICE MARKET, BY VOLTAGE RANGE
- 4.4 GAN POWER DEVICE MARKET, BY APPLICATION
- 4.5 GAN POWER DEVICE MARKET, BY VERTICAL
- 4.6 GAN POWER DEVICE MARKET IN APAC, BY VERTICAL AND BY COUNTRY
- 4.7 GAN POWER DEVICE MARKET, BY GEOGRAPHY

## **5 MARKET OVERVIEW**

### **5.1 INTRODUCTION**

### **5.2 MARKET DYNAMICS**

#### **5.2.1 DRIVERS**

5.2.1.1 Huge revenue generation from the consumer electronics and automotive verticals

5.2.1.2 Wide bandgap property of GaN material encouraging innovation

5.2.1.3 Success of GaN in RF-power electronics

5.2.1.4 Increasing adoption of GaN RF power device in military, defense, and aerospace vertical

#### **5.2.2 RESTRAINTS**

5.2.2.1 Competition from SiC devices in high-voltage power applications

#### **5.2.3 OPPORTUNITIES**

5.2.3.1 Potential use of GaN in 5G infrastructure

5.2.3.2 Applications in electric and hybrid electric vehicles

#### **5.2.4 CHALLENGES**

5.2.4.1 High material and fabrication costs

5.2.4.2 Design challenges and complexity

### **5.3 VALUE CHAIN ANALYSIS**

### **5.4 SUPPLY CHAIN ANALYSIS**

## **6 GAN POWER DEVICE MARKET, BY DEVICE TYPE**

### **6.1 INTRODUCTION**

### **6.2 POWER DEVICE**

#### **6.2.1 DISCRETE POWER DEVICE**

#### **6.2.2 INTEGRATED POWER DEVICE**

### **6.3 RF POWER DEVICE**

#### **6.3.1 DISCRETE RF POWER DEVICE**

#### **6.3.2 INTEGRATED RF POWER DEVICE**

## **7 GAN POWER DEVICE MARKET, BY VOLTAGE RANGE**

### **7.1 INTRODUCTION**

### **7.2 600 VOLT**

## **8 GAN POWER DEVICE MARKET, BY APPLICATION**

## 8.1 INTRODUCTION

## 8.2 POWER DRIVES

### 8.2.1 EV DRIVES

### 8.2.2 INDUSTRIAL DRIVES

### 8.2.3 LIGHT DETECTION AND RANGING

## 8.3 SUPPLY AND INVERTER

### 8.3.1 SWITCH-MODE POWER SUPPLY

### 8.3.2 INVERTER

### 8.3.3 WIRELESS CHARGING

### 8.3.4 EV CHARGING

## 8.4 RADIO FREQUENCY

### 8.4.1 RADIO FREQUENCY FRONT-END MODULE

### 8.4.2 REPEATER/BOOSTER/DAS

### 8.4.3 RADAR AND SATELLITE

## 9 GAN POWER DEVICE MARKET, BY VERTICAL

### 9.1 INTRODUCTION

### 9.2 TELECOMMUNICATIONS

### 9.3 INDUSTRIAL

### 9.4 AUTOMOTIVE

### 9.5 RENEWABLES

### 9.6 CONSUMER AND ENTERPRISE

### 9.7 MILITARY, DEFENSE, AND AEROSPACE

### 9.8 MEDICAL

## 10 GEOGRAPHIC ANALYSIS

### 10.1 INTRODUCTION

### 10.2 NORTH AMERICA

#### 10.2.1 US

#### 10.2.2 CANADA

#### 10.2.3 MEXICO

### 10.3 EUROPE

#### 10.3.1 UK

#### 10.3.2 GERMANY

#### 10.3.3 FRANCE

#### 10.3.4 REST OF EUROPE

## 10.4 APAC

### 10.4.1 CHINA

### 10.4.2 JAPAN

### 10.4.3 SOUTH KOREA

### 10.4.4 REST OF APAC

## 10.5 ROW

### 10.5.1 SOUTH AMERICA

### 10.5.2 MIDDLE EAST AND AFRICA

## 11 COMPETITIVE LANDSCAPE

### 11.1 OVERVIEW

### 11.2 MARKET RANKING ANALYSIS, 2016

### 11.3 COMPETITIVE SCENARIO

#### 11.3.1 PRODUCT LAUNCHES AND DEVELOPMENTS

#### 11.3.2 PARTNERSHIPS, CONTRACTS, ACQUISITIONS, AND AGREEMENTS

## 12 COMPANY PROFILES

(Business Overview, Products Offered, Strength of Product Portfolio, Business Strategy Excellence, Recent Developments, Key relationships)\*

### 12.1 KEY PLAYERS

#### 12.1.1 CREE

#### 12.1.2 INFINEON

#### 12.1.3 QORVO

#### 12.1.4 MACOM

#### 12.1.5 MICROSEMI

#### 12.1.6 MITSUBISHI ELECTRIC

#### 12.1.7 EFFICIENT POWER CONVERSION (EPC)

#### 12.1.8 GAN SYSTEMS

#### 12.1.9 NAVITAS SEMICONDUCTOR

#### 12.1.10 TOSHIBA

\*Details on Business Overview, Products Offered, Strength of Product Portfolio, Business Strategy Excellence, Recent Developments, Key relationships might not be captured in case of unlisted companies.

### 12.2 KEY INNOVATORS

#### 12.2.1 EXAGAN

#### 12.2.2 VISIC TECHNOLOGIES

#### 12.2.3 INTEGRA TECHNOLOGIES.

12.2.4 TRANSPHORM

12.2.5 QROMIS

12.3 OTHER KEY PLAYERS

12.3.1 GANPOWER

12.3.2 ANALOG DEVICES

12.3.3 PANASONIC

12.3.4 TEXAS INSTRUMENTS

12.3.5 AMPLEON

12.3.6 SUMITOMO ELECTRIC

12.3.7 NORTHROP GRUMMAN CORPORATION

12.3.8 DIALOG SEMICONDUCTOR

12.3.9 EPIGAN

12.3.10 POLYFET

## **13 APPENDIX**

13.1 INSIGHTS OF INDUSTRY EXPERTS

13.2 DISCUSSION GUIDE

13.3 KNOWLEDGE STORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

13.4 INTRODUCING RT: REAL-TIME MARKET INTELLIGENCE

13.5 AVAILABLE CUSTOMIZATIONS

13.6 RELATED REPORTS

13.7 AUTHOR DETAILS



## List Of Tables

### LIST OF TABLES

TABLE 1 GAN POWER DEVICE MARKET, BY DEVICE TYPE, 2014–2023 (USD MILLION)

TABLE 2 GAN POWER DEVICE MARKET, BY DEVICE TYPE, 2014–2023 (MILLION UNITS)

TABLE 3 GAN POWER DEVICE MARKET FOR POWER DEVICE, BY VERTICAL, 2014–2023 (USD MILLION)

TABLE 4 GAN POWER DEVICE MARKET FOR POWER DEVICES IN NORTH AMERICA, BY VERTICAL, 2014–2023 (USD MILLION)

TABLE 5 MARKET FOR POWER DEVICES IN EUROPE, BY VERTICAL, 2014–2023 (USD MILLION)

TABLE 6 GAN POWER DEVICE MARKET FOR POWER DEVICE IN APAC, BY VERTICAL, 2014–2023 (USD MILLION)

TABLE 7 GAN POWER DEVICE MARKET FOR POWER DEVICE IN ROW, BY VERTICAL, 2014–2023 (USD MILLION)

TABLE 8 GAN POWER DEVICE MARKET FOR POWER DEVICE, BY REGION, 2014–2023 (USD MILLION)

TABLE 9 GAN POWER DEVICE MARKET FOR POWER DEVICE IN TELECOMMUNICATIONS, BY REGION, 2014–2023 (USD MILLION)

TABLE 10 GAN POWER DEVICE MARKET FOR POWER DEVICE IN INDUSTRIAL, BY REGION, 2014–2023 (USD MILLION)

TABLE 11 GAN POWER DEVICE MARKET FOR POWER DEVICE IN AUTOMOTIVE, BY REGION, 2014–2023 (USD MILLION)

TABLE 12 GAN POWER DEVICE MARKET FOR POWER DEVICE IN RENEWABLES, BY REGION, 2014–2023 (USD MILLION)

TABLE 13 GAN POWER MARKET FOR POWER DEVICE IN CONSUMER AND ENTERPRISE, BY REGION, 2014–2023 (USD MILLION)

TABLE 14 GAN POWER MARKET FOR POWER DEVICE IN MILITARY, DEFENSE, AND AEROSPACE, BY REGION, 2014–2023 (USD MILLION)

TABLE 15 GAN POWER DEVICE MARKET FOR POWER DEVICE IN MEDICAL, BY REGION, 2014–2023 (USD MILLION)

TABLE 16 GAN POWER DEVICE MARKET FOR POWER DEVICE IN TELECOMMUNICATIONS, BY APPLICATION, 2014–2023 (USD MILLION)

TABLE 17 GAN POWER DEVICE MARKET FOR POWER DEVICE IN INDUSTRIAL, BY APPLICATION, 2014–2023 (USD MILLION)

TABLE 18 GAN POWER DEVICE MARKET FOR POWER DEVICE IN AUTOMOTIVE,

BY APPLICATION, 2014–2023 (USD MILLION)

TABLE 19 GAN POWER DEVICE MARKET FOR POWER DEVICE IN CONSUMER AND ENTERPRISE, BY APPLICATION, 2014–2023 (USD MILLION)

TABLE 20 GAN POWER DEVICE MARKET FOR POWER DEVICE IN MILITARY, DEFENSE, AND AEROSPACE, BY APPLICATION, 2014–2023 (USD MILLION)

TABLE 21 GAN POWER DEVICE MARKET FOR POWER DEVICE IN MEDICAL, BY APPLICATION, 2014–2023 (USD MILLION)

TABLE 22 GAN POWER DEVICE MARKET FOR POWER DEVICE, BY TYPE, 2014–2023 (USD MILLION)

TABLE 23 GAN POWER DEVICE MARKET FOR RF POWER DEVICE, BY VERTICAL, 2014–2023 (USD MILLION)

TABLE 24 GAN POWER DEVICE MARKET FOR RF POWER DEVICE IN NORTH AMERICA, BY VERTICAL, 2014–2023 (USD MILLION)

TABLE 25 GAN POWER DEVICE MARKET FOR RF POWER DEVICE IN EUROPE, BY VERTICAL, 2014–2023 (USD MILLION)

TABLE 26 GAN POWER DEVICE MARKET FOR RF POWER DEVICE IN APAC, BY VERTICAL, 2014–2023 (USD MILLION)

TABLE 27 GAN POWER DEVICE MARKET FOR RF POWER DEVICE IN ROW, BY VERTICAL, 2014–2023 (USD MILLION)

TABLE 28 GAN POWER DEVICE MARKET FOR RF POWER DEVICE, BY REGION, 2014–2023 (USD MILLION)

TABLE 29 GAN POWER DEVICE MARKET FOR RF POWER DEVICE IN TELECOMMUNICATIONS, BY REGION, 2014–2023 (USD MILLION)

TABLE 30 GAN POWER DEVICE MARKET FOR RF POWER DEVICE IN INDUSTRIAL, BY REGION, 2014–2023 (USD MILLION)

TABLE 31 GAN POWER DEVICE MARKET FOR RF POWER DEVICE IN AUTOMOTIVE, BY REGION, 2014–2023 (USD MILLION)

TABLE 32 GAN POWER DEVICE MARKET FOR RF POWER DEVICE IN RENEWABLES, BY REGION, 2014–2023 (USD MILLION)

TABLE 33 GAN POWER DEVICE MARKET FOR RF POWER DEVICE IN CONSUMER AND ENTERPRISE, BY REGION, 2014–2023 (USD MILLION)

TABLE 34 GAN POWER DEVICE MARKET FOR RF POWER DEVICE IN MILITARY, DEFENSE, AND AEROSPACE, BY REGION, 2014–2023 (USD MILLION)

TABLE 35 GAN POWER DEVICE MARKET FOR RF POWER DEVICE IN TELECOMMUNICATIONS, BY APPLICATION, 2014–2023 (USD MILLION)

TABLE 36 GAN POWER DEVICE MARKET FOR RF POWER DEVICE IN AUTOMOTIVE, BY APPLICATION, 2014–2023 (USD MILLION)

TABLE 37 GAN POWER DEVICE MARKET FOR RF POWER DEVICE IN RENEWABLES, BY APPLICATION, 2014–2023 (USD MILLION)

TABLE 38 GAN POWER DEVICE MARKET FOR RF POWER DEVICE IN CONSUMER AND ENTERPRISE, BY APPLICATION, 2014–2023 (USD MILLION)

TABLE 39 GAN POWER DEVICE MARKET FOR RF POWER DEVICE IN MILITARY, DEFENSE, AND AEROSPACE, BY APPLICATION, 2014–2023 (USD MILLION)

TABLE 40 GAN POWER DEVICE MARKET FOR RF POWER DEVICE, BY TYPE, 2014–2023 (USD MILLION)

TABLE 41 GAN POWER DEVICE MARKET, BY VOLTAGE RANGE, 2014–2023 (USD MILLION)

TABLE 42 GAN POWER DEVICE MARKET, BY APPLICATION, 2014–2023 (USD MILLION)

TABLE 43 GAN POWER DEVICE MARKET FOR POWER DRIVES, BY APPLICATION, 2014–2023 (USD MILLION)

TABLE 44 GAN POWER DEVICE MARKET FOR LIDAR, BY VERTICAL, 2014–2023 (USD MILLION)

TABLE 45 GAN POWER DEVICE MARKET FOR SUPPLY AND INVERTER, BY APPLICATION, 2014–2023 (USD MILLION)

TABLE 46 GAN POWER DEVICE MARKET FOR SMPS, BY VERTICAL, 2014–2023 (USD MILLION)

TABLE 47 GAN POWER DEVICE MARKET FOR INVERTERS, BY VERTICAL, 2014–2023 (USD MILLION)

TABLE 48 GAN POWER DEVICE MARKET FOR WIRELESS CHARGING, BY VERTICAL, 2014–2023 (USD MILLION)

TABLE 49 GAN POWER DEVICE MARKET FOR RADIO FREQUENCY, BY APPLICATION, 2014–2023 (USD MILLION)

TABLE 50 GAN POWER DEVICE MARKET FOR RF FEM, BY VERTICAL, 2014–2023 (USD MILLION)

TABLE 51 GAN POWER DEVICE MARKET FOR REPEATER/BOOSTER/DAS, BY VERTICAL, 2014–2023 (USD MILLION)

TABLE 52 GAN POWER DEVICE MARKET FOR RADAR AND SATELLITE, BY APPLICATION, 2014–2023 (USD MILLION)

TABLE 53 GAN POWER DEVICE MARKET, BY VERTICAL, 2014–2023 (USD MILLION)

TABLE 54 GAN POWER DEVICE MARKET FOR TELECOMMUNICATIONS, BY REGION, 2014–2023 (USD MILLION)

TABLE 55 GAN POWER DEVICE MARKET FOR INDUSTRIAL, BY REGION, 2014–2023 (USD MILLION)

TABLE 56 GAN POWER DEVICE MARKET FOR AUTOMOTIVE, BY REGION, 2014–2023 (USD MILLION)

TABLE 57 GAN POWER DEVICE MARKET FOR RENEWABLES, BY REGION,

2014–2023 (USD MILLION)

TABLE 58 GAN POWER DEVICE MARKET FOR CONSUMER AND ENTERPRISE, BY REGION, 2014–2023 (USD MILLION)

TABLE 59 GAN POWER DEVICE MARKET FOR MILITARY, DEFENSE, AND AEROSPACE, BY REGION, 2014–2023 (USD MILLION)

TABLE 60 GAN POWER DEVICE MARKET FOR MEDICAL, BY REGION, 2014–2023 (USD MILLION)

TABLE 61 GAN POWER DEVICE MARKET, BY REGION, 2014–2023 (USD MILLION)

TABLE 62 GAN POWER DEVICE MARKET IN NORTH AMERICA, BY COUNTRY, 2014–2023 (USD MILLION)

TABLE 63 GAN POWER DEVICE MARKET IN NORTH AMERICA, BY VERTICAL, 2014–2023 (USD MILLION)

TABLE 64 GAN POWER DEVICE MARKET IN EUROPE, BY COUNTRY, 2014–2023 (USD MILLION)

TABLE 65 GAN POWER DEVICE MARKET IN EUROPE, BY VERTICAL, 2014–2023 (USD MILLION)

TABLE 66 GAN POWER DEVICE MARKET IN APAC, BY COUNTRY, 2014–2023 (USD MILLION)

TABLE 67 GAN POWER DEVICE MARKET IN APAC, BY VERTICAL, 2014–2023 (USD MILLION)

TABLE 68 GAN POWER DEVICE MARKET IN ROW, BY VERTICAL, 2014–2023 (USD MILLION)

TABLE 69 10 MOST RECENT PRODUCT LAUNCHES IN THE GAN POWER DEVICE MARKET

TABLE 70 PARTNERSHIPS, CONTRACTS, AND AGREEMENTS IN THE GAN POWER DEVICE MARKET

## About

According to the new market research report on the "GaN Power Device Market by Device Type (Power, RF Power), Voltage Range, Application (Power Drives, Supply & Inverter, and RF), Vertical (Telecommunications, Consumer, Automotive, Military, Defense, Aerospace), and Geography - Global Forecast to 2023", this market is expected to be worth USD 1,890.2 Million by 2023 from USD 408.3 Million in 2017, at a CAGR of 29.1% between 2017 and 2023. The major factors driving the growth of the GaN power device industry include huge revenue generation from the consumer electronics and automotive verticals, wide bandgap property of GaN material encouraging innovation, success of GaN in RF-power electronics, and increasing adoption of GaN RF power device in military, defense, and aerospace verticals.

### **The key players in this industry are:**

Cree (US),

Qorvo (US),

MACOM (US),

Microsemi Corporation (US),

Analog Devices US),

Efficient Power Conversion (US),

Integra Technologies (US),

Transphorm (US),

Navitas Semiconductor (US),

Texas Instruments (US),

Sumitomo Electric (Japan),

Northrop Grumman Corporation (US),

Qromis (US), Polyfet (US),

TOSHIBA (Japan),

Sumitomo Electric (Japan),

Mitsubishi Electric (Japan),

Panasonic (Japan),

GaN Systems (Canada),

VisIC Technologies (Israel),

GaNPower (Canada),

Infineon (Germany),

Exagan (France),

Ampleon (Netherlands), and

EpiGaN (Belgium).

### **Power device to grow at the highest rate during the forecast period**

GaN power device market for power devices is estimated to register the highest CAGR during the forecast period. This is attributed to its characteristics such as high breakdown voltage and low conduction resistance characteristics that enable high-speed switching and miniaturization. Moreover, the large total addressable markets such as power distribution systems, industrial systems, heavy electrical systems, turbines, heavy machinery, advanced industrial control systems, and electromechanical computing/computer systems, as well as several new power applications (clean-tech) such as high-voltage direct current (HVDC), smart grid power systems, wind turbines, wind power systems, solar power systems, and electric and hybrid electric vehicles are among the prime reasons for its faster growth.

## **Telecommunications expected to hold the largest market share by 2023**

The telecommunications vertical is expected to hold the largest share of the GaN power device market during the forecast period. With the recent developments in 5G technology, it is most likely to be commercialized in the late 2020 or early 2021, mainly in developed economies such as the US, Germany, the UK, Japan, and South Korea. The spending on its infrastructure is likely to start approximately two years before its expected launch, which has been considered as 2019. Thus, 5G technology would have a positive impact on the telecommunications sector from 2019, and the demand for 5G technology is expected to increase between 2021 and 2022, which, in turn, would boost the growth of the GaN power device market.

## **APAC likely to hold the largest share of the GaN power device market during the forecast period**

Asia Pacific (APAC) is expected to hold the largest share of the GaN power device market during the forecast period owing to the growing demand for power devices in the industrial, computing, telecommunications, automotive and military, and aerospace and defense verticals in emerging Asian countries such as China, Japan, Taiwan, the Philippines, and India. Moreover, the EV charging and electric vehicle production markets, as well as increasing renewable energy generation are driving the growth of the GaN power device market in APAC.

The report also profiles the most promising players in the GaN power device market. The competitive landscape of the market presents an interesting picture of the strategies adopted by a large number of players.



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