

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

<https://marketpublishers.com/r/G807C31A830EN.html>

Date: December 2017

Pages: 172

Price: US\$ 5,650.00 (Single User License)

ID: G807C31A830EN

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.

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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),

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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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