Global and China Connectivity RF Industry Report, 2014-2015

https://marketpublishers.com/r/G515149E580EN.html
Date: June 2015
Pages: 96
Price: US$ 2,150.00 (Single User License)
ID: G515149E580EN

Abstracts

The report covers the followings:

Introduction to Connectivity RF

Analysis on Connectivity RF Market

Analysis on Connectivity RF Industry

Research on 20 Connectivity RF Companies

A Connectivity RF system is a radio frequency system consisting of electronic devices connected to the network, mainly applied to mobile phones, tablet PCs, laptopsand WLAN / PAN now, and will find wide application in IoT (Internet of Things).

The Connectivity RF system market size reached approximately USD7.516 billion in 2014, showing a substantial rise of 23.4% over 2013. In 2015, the market size is expected to go up by 34.1% year on year to USD10.08 billion. It will maintain the growth rate of 17.3% by 2016, becoming the fastest growing field among all electronic components.

The rapid growth of the Connectivity RF system market is primarily prompted by 4G mobile phones. A standard 2G mobile phone requires a Connectivity RF system costing only about USD0.55, a 3G phone USD2.75, while a 4G phone up to USD8 and a global standard 4G phone USD13 or above. The penetration rate of 4G phones in China is the highest in the world. China’s 4G mobile phone shipment only accounted for 2% of the

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total mobile phone shipment in December 2013, but the proportion jumped to 71% in December 2014 and more than 80% in March 2015.

In 2015, a wave of 4G phone replacement will speed up worldwide, which will stimulate the Connectivity RF system market.

The rapid growth of 802.11ac is another driving engine. Less than 10% of WiFi supported 802.11ac in 2014, while the proportion is expected to be 80% in 2018. The Connectivity RF cost of 802.11ac is much higher than that of the current mainstream 802.11a/b/g. The next development direction of LTE will be carrier aggregation (CA). The shipment of mobile phones supporting carrier aggregation only amounted to 108 million units in 2014, and is expected to reach 1.185 billion units by 2018. Carrier aggregation makes Connectivity RF more complex and costly.

The core of a Connectivity RF system includes PA and filters (the fastest growing segment). LTE-FDD's Band 8, 13 and 26 need TC-SAW, Band 4, 5, 12, 17, 20, 27 and 28 require SAW, Band 2, 3, 7, 23, 25 and 30 demand BAW, while LTE-TDD's Band 38, 10, 41, 42 and 43 use SAW.

In the highly concentrated Connectivity RF system industry, the top five companies enjoy over 97% market share, which is hard for small firmsto survive. One reason is that PA requires unique GaAs wafers instead of the traditional Si wafers; the other reason rests with the high production threshold in the filter field. All laboratories can accomplish trial production, but only a handful of companies (mainly Japanese companies) are capable to conduct mass production with high consistency and quality. Major SAW companies embrace Murata, TDK and Fujitsu. Panasonic and Qorvo target TC-SAW. Avago, Qorvo, Taiyoyuden and TDK focus on BAW.

Qorvo is a new company after the merger of RFMD and Triquint. Taiwanese companies witness the fastest growth in 2015. For example, Skyworks and Avago outsource considerable products to their foundries Win and AWSC respectively, especially Avago lavish huge capital on acquisitions to significantly reduce manufacturing costs, so that AWSC's revenue will ascend by at least 200% in 2015.

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Contents

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Selected Charts

SELECTED CHARTS

Typical RF Structure
Connectivity RF Market Size, 2011-2017E
Filter Market Size, 2011-2017E
Downstream Distribution of Connectivity RF Market, 2011-2017E
Major Companies in Connectivity RF Industry Chain
Costs of Mobile Phone RF System
LTE/WCDMA/CDMA/GSM Block Diagram of Apple iPhone 5S
LTE/WCDMA/GSM Block Diagram of Samsung SM-G900S
Bands Used for Mobile Phone RF Filters
Application Number of Mobile Phone RF Filters
Comparison between BAW and SAW
Shipment of Mobile Phone-use Duplexers / FABR Filters, 2013-2017E
Market Share of Major SAW Filter Companies, 2015
Mobile Phone Antenna Switch Shipment by Technology, 2010-2016E
Market Share of Major Global Mobile Phone Antenna Switch Companies, 2012
Ranking of Global Connectivity RF Companies by Revenue, 2011-2015
Frequency Bands per Mobile Handset Device, 2000-2018E
Cellular Terminal Shipment by Celluar Standard, 2000-2018E
LTE-enabled Cellular Terminal Shipment, 2011-2018E
Worldwide Smartphone Sales to End Users by Vendor, 2014
Worldwide Smartphone Sales to End Users by Operating System, 2014
Shipment of Top Ten Global Mobile Phone Companies, 2014
Monthly Shipment of Chinese Mobile Phone Market, 2013-2014
Market Share of Major Companies in Chinese Smart Phone Market, 2014
Market Share of Major Companies in Chinese 4G Mobile Phone Market, 2014
Laptop Computer Shipment, 2008-2015
Shipment of Major Global Laptop ODM Companies, 2010-2014
Global Tablet PC Shipment, 2011-2016E
Shipment of Top Five Tablet Vendors, Q4 2014
Shipment, Market Share and Growth of Top Five Tablet Vendors, 2014
Total Shipment of Wi-Fi Enabled Products, 2012-2016E
Murata’s Sales and Operation Margin, FY2009-FY2016
Murata’s Sales by Product, FY2013-2016
Murata’s Major Products
Murata's Sales by Application, FY2013-2016

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Operating Income of Bridge of Murata, FY2014-2015
Murata's Quarterly Sales, Order and Backlog, Q2 2012-Q1 2015
Global Distribution of KOPIN
Revenue and Operating Margin of KOPIN, 2006-2011
Revenue of KOPIN by Business, 2008-2011
Revenue of KOPIN by Client, 2008-2011
Revenue and Operating Margin of AXT, 2006-2015
Revenue of AXT by Product, 2006-2013
Revenue of AXT by Region, 2006-2014
Revenue and Operating Margin of IQE, 2005-2013
Revenue of IQE by Business, 2008-2014
Revenue of IQE by Region, 2008-2014
Organizational Structure of WIN Semiconductor
Divisions of WIN Semiconductor
Revenue and Operating Margin of WIN Semiconductor, 2006-2015
Quarterly Revenue of WIN Semiconductor, Q2 2013-Q1 2015
Quarterly Gross Margin, Operating Margin and Net Profit Margin of WIN Semiconductor, Q2 2013-Q1 2015
Monthly Revenue of WIN Semiconductor, Apr 2013-Apr 2015
Revenue of WIN Semiconductor by Product, 2014-Q1 2015
Manufacturing Capacity of WIN Semiconductor, 2005-2013
Core Competitiveness of WIN Semiconductor
Organizational Structure of AWSC
Revenue and Gross Margin of AWSC, 2006-2015
Revenue and Operating Margin of AWSC, 2009-2016
Monthly Revenue of AWSC, Apr 2013-Apr 2015
Revenue and Operating Margin of VPEC, 2007-2015
Monthly Revenue of VPEC, Mar 2013- Mar 2015
Revenue of VPEC by Product, Q1 2012-Q4 2013
Revenue and Gross Margin of TRIQUNIT, 2001-2014
Revenue of TRIQUINT by Business, 2005-2014
TRIQUINT’s Mobile Phone Revenue by System, 2005-2012
GaAs Capacity of TRIQUINT’s Texas Plant, Q1 2009-Q4 2011
BAW Capacity of TRIQUINT’s Texas Plant, Q1 2009-Q4 2011
FLSAW Capacity of TRIQUINT’s Florida Plant, Q1 2009-Q4 2011
FLIP CHIP Capacity of TRIQUINT’s Costa Rica Plant, Q1 2009-Q4 2011
RF Framework Trend of Smart Phones
Revenue and Operation Margin of Avago, FY2007-FY2015
Balance Sheet of Avago, FY2010-FY2014

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