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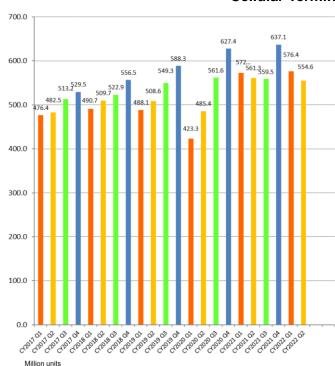
RF Devices/Modules For Cellular Terminal Quarterly Market Report Q1 2022

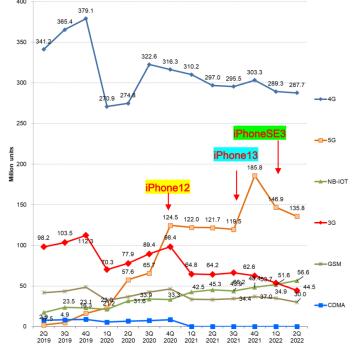
Released on September 15th ,2022

RF Components & Modules in this report

- 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 Shipment History













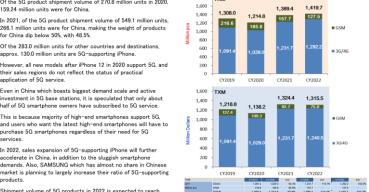


Voice

Report Sample

5G Shipment by destination Market Forecast of TX Module in CY2022 gish smartphone demand in China and expanding sales of 5G In 2021, of the 5G product shipment volume of 549.1 million units 266.1 million units were for China, making the weight of products for China dip below 50%, with 48.5%.

- Of the 283.0 million units for other countries and desi However, all new models after iPhone 12 in 2020 support 5G, and their sales regions do not reflect the status of practical ir sales regions do not dication of 5G service
- Even in China which boasts higgest demand scale and activ half of 5G smartphone owners have subscribed to 5G service.
- This is because majority of high-end smartphones support 5G, and users who want the latest high-end smartphones will have to purchase 5G smartphones regardless of their need for 5G In 2022, sales expansion of 5G-supporting iPhone will further lerate in China, in addition to the sluggish smartp demands. Also, SAMSUNG which has almost no share in Chines
- Shipment volume of 5G products in 2022 is expected to reach 678.7 million units, with ratio of products for China significantly dropping to 33.9%.



◆ Market has been on expanding trend from 2021, since cases are emerging where some middle/low-end 5Gsupporting products adopt TX Module and also, certain percentage of IoT Module which the market continues to

expand is adopting TX Module.

◆ Market size of TX Module in 2022 is expected to be 1,419.7 million pcs (YoY 102.2%, quantity) and 1,315.5 million dollars (YoY 99.3%, amount).



M/M PAM Market Share

for CY2021 & CY2022 ◆ Top shareholder Skyworks has high share of MMPAM with built-in low-band PAMiD for Apple and Media Tek platform, and also has overwhelming share of MMPAM for LTE smartphones in Chinese market. Runner-up is Qorvo, which has a second vendor-like position of Skyworks in Chinese market. Broadcom is in the process of withdrawing from MMPAM for COB, and supplies mostly for their inhouse PAMiD However, the shares of these top 3 companies are or a downward trend.

It is because of share expansion of South Korean WiPAM which mainly supplies for SAMSUNG, and RADROCK, On Micro, Smarter Micro, Vanchip, etc. which supplies for Chinese low-end smartphone and IOT Module. (all categorized under OTHERS)





■Outline of the report

RF Devices/Modules For Cellular TerminalQuarterly Market Report Q1 2022 -CD-ROM (PDF file)-

OThe date of issue September 15th ,2022

OThe Documents of the report The PDF file of 210 SLIDES: MS PowerPoint based/Excel data/JPEG files of Teardown photos

OReport price JP¥168,000

OAnnual subscription for four quarterly issues JP¥560,000(JP¥140,000/report)

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- (3) Detailed Data of Front End Module Marke
- (4) Front End Module Market Size & Trend by Product

Q1 CY2019-Q1 CY2022

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- 2TX Module
- 3FEMiD
- 4All-in-One FEM
- ⑤PAMiD

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- Antenna Multiplexer
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Antenna Switch TOTAL Market Size

Antenna Switch for Main RF Market Size by Throw Count Antenna Switch for Main RF Market Size by Substrate

Antenna Switch for Diversity Market Size by Substrate

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- (1) TCXO Market Size ~ Q1 CY2022
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ASM Market Share for CY2022 Forecast

ASM Market Share Breakdown per Product Type

(2) RX Module

RX Module Market Share for CY2022 Forecast
RX Module Market Share Breakdown per Product Type

(3) TX Module

TX Module Market Share for CY2022 Forecast

TX Module Market Share Breakdown per Product Type

(4) FEMiD

FEMiD Market Share for CY2022 Forecast

FEMiD Market Share Breakdown per Product Type

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PAiD Market Share for CY2022 Forecast

PAiD Market Share Breakdown per Product Type

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Duplexer Bank Market Share for CY2022 Forecast

Duplexer Bank Market Share Breakdown per Product Type

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- -COB based 5G Smartphone with UNISOC Chipset

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1 RF Circuit Block Diagram

- ② Teardown pictures & RF Modules/Components
- (3) Fibocom FM650-CN
- -5G M2M WWAN Module with UNISOC Chipset-
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Navian Marketing Report

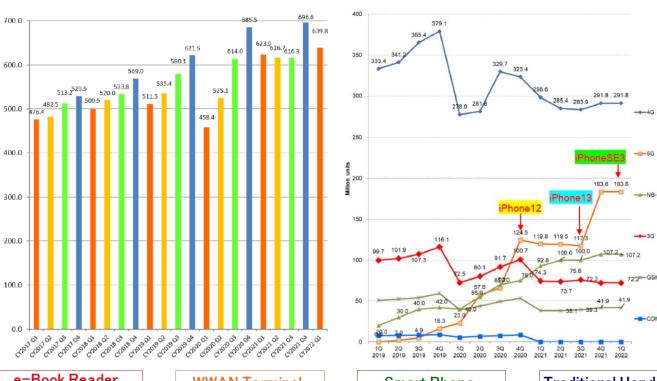
RF Devices/Modules For Cellular Terminal Quarterly Market Report Q1 2022

2022 年 8 月 31 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











Report Sample

5G Shipment by destination

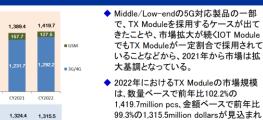
中国のスマホ需要の低迷と5G iPhoneの拡販で中国依存度は低下へ

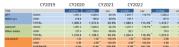


- ◆ 2020年における5G製品の出荷台数2億7.080万台のうち、1億 5.924万台が中国向けとなった
- ◆ 2021年は、5G製品の出荷台数5億4.910万台のうち、2億6.610 万台が中国向けとなり、中国向けのウエイトは48.5%と、五割を
- ◆ その他の国・地域向けの 2億8,300万台のうち1億3,000万台程度が5G対応のiPhoneである。
- ◆ ただ、2020年のiPhone12以降の新機種は全機種が5Gに対応 しており、その販売地域は5Gサービスの実用化状況を反映し
- ◆ 最も需要規模が大きく、5G基地局の積極的な投資が行われて いる中国においても、5Gサービスを契約しているのは5G Smartphone所有者の半数程度と推定されている。
- ◆ これは、High-end Smartphoneの大半が5G対応となっている 為で、最新のHigh-end Smartphoneを求めるユーザーは5G サービスの要不要問わず5G Smartphoneを購入することにな
- ◆ 2022年は、中国におけるSmartphone需要の低速に加えて、 56対応のiPhoneの拡張が一段と加速することや、中国市場に おいて発送シェアを持たないSAMSUNGも5G対応製品の比率 を大きく引き上げる計画だ。
- ◆ 2022年における5G製品の出荷台数は、6億7,870万台が見込まれ、このうち中国向けの比率は33.9%と大きく落ち込むと予想される。

Market Forecast of TX Module in CY2022

Fibocom FM650-CN





M/M PAM Market Share for CY2021 & CY2022



- ◆ 主にSAMSUNG向けに供給する韓国のWiPAMや 中国のLow-end SmartphoneやIOT Module等に供給するRADROCK・OnMicro・Smarter Micro・On Micro・Vanchip等のシェアが拡大している為だ。 (いずれもOTHERSに分類)



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- (7)PAiD
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Antenna Switch TOTAL Market Size

Antenna Switch for Main RF Market Size by Throw Count Antenna Switch for Main RF Market Size by Substrate

Antenna Switch for Diversity Market Size by Substrate

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TX Module Market Share for CY2022 Forecast

TX Module Market Share Breakdown per Product Type

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FEMiD Market Share for CY2022 Forecast

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