After a fall in 2015, the overall RF power market is still declining in 2016 as telecom operators invest less. By year-end, the total RF power semiconductor market was close to $1.5B for all applications above 3W. We expect the market to recover in coming years thanks to increasing demand for telecom base station upgrades and small cell implementations. Overall market revenue could potentially increase 75% by the end of 2022, posting a CAGR of 9.8% from 2016-2022.

We are today standing at the threshold of completion of 4G network, and then beginning the transition to 5G. There’re still a lot to be settled and established, however some things are for sure: the new radio network will require more devices and higher frequencies. Chip providers therefore have a tremendous opportunity, especially RF power semiconductor sellers. We estimate the market size of telecom infrastructure including base stations and wireless backhaul accounts for about half of the total market size. It will continue growing fast at an expected 12.5% CAGR for base stations and 5.3% CAGR for telecom backhaul over 2016–2022.

In the meantime, defense applications are also providing good opportunities for RF power devices as there’s a trend of replacing old vacuum tube designs with solid state technologies exploiting GaAs and GaN. These new technologies provide better performance and reduced size as well as robustness in various use cases, and are gradually taking more market share. We estimate this market segment’s revenue to increase around 20% by 2022 with a CAGR of 4.3% for 2016-2022.

We invite you to read our report and discover more details about the telecom and military markets, as well as other markets including civil radar, wired broadband, satellite communication, RF energy and many others. This report offers a complete analysis covering different RF Power players such as NXP, Ampleon, Qorvo, Infineon, Sumitomo Electric, M/A/COM, Wolfspeed, UMS, Analog Devices and devices developed and implemented in power amplifier applications. This report also includes a detailed comparison of the technology landscapes for LDMOS, GaAs, GaN and SiGe in different markets.
In the meantime, GaAs will also secure a considerable share in the industry with its implementation in defense and CATV markets. Thanks to the mobile cellular industry, GaAs technology is very mature and accessible in the market. This will allow a smooth transition into solid state technology in several military applications.

But this does not necessarily mean the doom of LDMOS. There will still be a very solid market share that LDMOS can handle with its maturity and low cost. Also, the development of the RF energy market also potentially offers future prospects for LDMOS.

For the next 5-10 years, Yole Développement envisions that GaN will gradually replace LDMOS and become the major technology for RF power applications above 3W. GaAs will keep its share thanks to its proven reliability and good cost performance ratio. LDMOS will decline and drop to around 15% of the overall market size.

This report also covers the development of GaN-on-SiC devices versus GaN-on-silicon and their impact on the industrial supply chain and on players involved.

In multiple input, multiple output (MIMO) will actually put GaN in a superior position compared to existing LDMOS with its high efficiency and broadband capability.

As the developing trends become ever clearer, RF power players are investing and hoping to win the competition to be the leader in next generation technology. Major LDMOS players like NXP, Aampleon and Infineon are gaining access to GaN technology by using external foundries. Meanwhile, traditional GaAs players have been investing in GaN technologies. Some have succeeded in converting their production capacity, with their savoir-faire in the compound semiconductor area allowing them to adapt to GaN technology and take the lead in today’s market. Pure GaN players like Wolfspeed are on one hand supplying major LDMOS players, hoping to grow the market together. On the other hand, they are trying to ensure their leading place in GaN technologies with better processes and larger wafer production capacities.

We see that today’s leading RF players are still the leaders in the LDMOS area. However, when GaN devices become dominant in the future, the leaders will become those who hold the largest GaN market share. The current top GaN RF players mostly have GaAs experience and there’s only one pure GaN player: Wolfspeed.

Under these circumstances, Infineon Technologies’ acquisition offer for Wolfspeed seemed insightful and beneficial. If it wasn’t for the disapproval from US government, this deal could have brought Infineon a dominant position in the future GaN industry, providing it with a complete portfolio in both RF and power applications. At the same time, the legal action initiated by MACOM Technology Solutions against Infineon concerning GaN patents caused a sensation last year. Although it is still ongoing, we wonder if more blood will be spilled in the future, and how much value these leading players are fighting for.

A BRAWL AMONG RF POWER PLAYERS?

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Evolution of the RF power industry supply chain

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TABLE OF CONTENTS (complete content on i-Micronews.com)

| Acronyms | 6 |
| Companies cited in this report | 7 |
| Report objectives | 8 |
| Revision of GaN RF devices market report | 9 |
| Executive summary | 12 |
| Device technology | 40 |
| > RF component overview | |
| > Device structure | |
| > RF power package design | |
| > Plastic and non-hermetic package development trend | |
| RF power applications | 58 |
| > Scope of the report | |
| > Application range and technology trends | |
| > Technology capability comparison | |
| > RF power devices: technology breakdown | |
| > RF power devices: market size forecast | |
| > RF power devices: device volume forecast | |
| > Product life cycle in 2016 and in 2022 of different technologies | |
| Telecom infrastructure | 74 |
| > Cellular technology development | |
| > 5G standardization timeline | |
| > Major operators’ 5G trials and test developments | |
| > Key enabling technologies for 5G | |
| > Base station structure and design circuit | |
| > Market requirements and device capability | |
| > Base station type and number forecast | |
| > Small cell forecast | |
| > Estimated RF power device needs in telecom | |
| > Estimated total market for RF Power devices in telecom | |
| > Comparison of different technologies | |
| Defense | 111 |
| > Military RF applications and frequency bands | |
| > End application analysis including radar systems, jammers etc. | |
| > Market requirements and device capabilities | |
| > Roadmap for RF power transistor volume in military applications | |
| > Estimated total market for RF power device in defense | |
| > Comparison of different technologies | |
| Civil radar and avionics | 125 |
| > End application analysis including commercial/ scientific, radar, and avionics applications | |
| > Market requirements and device capabilities | |
| > RF power transistor volume in non-military RADAR applications | |
| > RF power transistor market size in non-military RADAR applications | |
| > Comparison of different technologies | |

Wired broadband 134

| > CATV: the basics | |
| > Main RF development in CATV | |
| > Evolution of DOCSIS 3.1 | |
| > CATV market in geographical terms | |
| > HFC vs. FTTH | |
| > CATV market size evolution | |
| > Market requirements and device capabilities | |
| > Estimated yearly needs for wired broadband market | |
| > Estimated yearly market size for wired broadband market | |

Satellite communications 148

| > RF chain and types of devices | |
| > Market drivers for RF Power devices | |
| > Market requirements and device capabilities | |
| > Estimated yearly needs for SATCOM market | |
| > Estimated yearly market size for SATCOM market | |
| > Comparison of different technologies | |

RF energy 159

| > RF power device for RF energy | |
| > Microwave ovens | |
| > Plasma lighting | |
| > Market requirements and device capabilities | |
| > Estimated yearly needs for RF energy market | |
| > Estimated yearly market size for RF energy market | |
| > Comparison of different technologies | |

Market landscape 168

| > Main RF power players and their target applications | |
| > Mapping: players involved with RF power devices | |
| > RF foundry technology comparison: process and capacity estimation | |
| > Major GaAs foundry capacity evolution | |
| > Global industrial supply chain | |
| > Estimate of GaN/LDMOS/GaAs RF player market shares in 2016 | |
| > Estimate of overall RF power player market shares in 2016 | |
| > Events and development dynamics | |

Special focus on GaN RF technology 192

| > Commercially-available GaN-on-SiC devices vs. GaN-on-Silicon devices | |
| > GaN-on-Silicon vs. GaN-on-SiC comparison | |
| > GaN-on-SiC vs. GaN-on-Silicon market strategies | |
| > GaN-on-SiC and GaN-on-Silicon future development scheme | |
| > Competition trends | |

General conclusion 200

| > Market overview | |
| > Analysis in different markets | |
| > RF power industry and technology trends | |
| > Conclusions | |

REPORT OBJECTIVES
- Provide an overview of the entire RF power market.
- Analyze different players in different markets, along with their product ranges and technologies.
- Outline market access – market size evolution from 2016-2022 and technology breakdown.
- Highlight the main technologies in the different application markets.
- Explain the needs of different RF markets and the corresponding impact on the needs for different technologies, along with geographical specifics.

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