Navian Marketing Report

Cellular 端末と高周波部品市場の四半期動向

RF Devices / Modules For Cellular Terminal

Quarterly Market Report Q2 2025

2025 年 12 月 22 日発刊

本レポートで対象とする RF Devices / Modules

- **Front End Module**： ASM ・ TX Module ・ FEMiD ・ PAMiD ・ Diversity FEM ・ Multiplexer ・ A-Multiplexer
- **5G**： 5G TX Module （ PAMiF ） ・ 5G RX Module ・ EN-DC FEM ・ AiP ・ mmW Module ・ 5G BPF
- **Antenna Switch** （ Main RF ／ Diversity ） ● **Power Amplifier Module** ● TCXO
- **Duplexer** ● **Band Pass Filter** （ SAW ／ TF-SAW ／ BAW ・ IPD ／ LTCC ）
- **Teardown**： **iPhone 17 ・ iPhone Air ・ iPad Pro 11 inch （ A3358 ）** ・ MURATA XBAR vs. Broadcom FBAR

Cellular Terminal Categories



本レポートのポイント

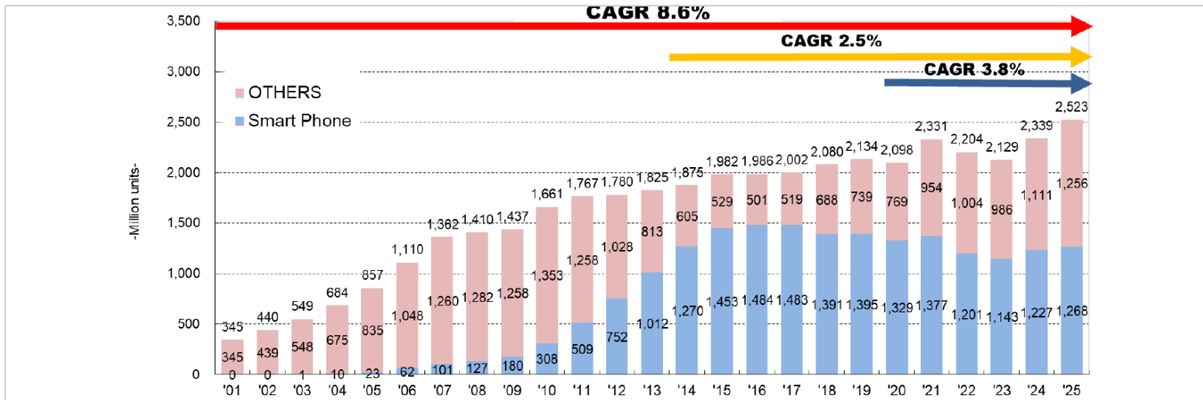
■ **Cellular 端末**の出荷台数（数量ベース）は、 2Q2025 に 600.0M units （前年同期比 +5.7% ）となった。

■ **Cellular 端末**の出荷台数は、 CY2025 に 2,523.0M units （前年比 +7.9% ）となる見込み。このうち IoT etc は 931.8M units （ +17.7% ）となる見込み。

■ **5G 端末**の出荷台数（数量ベース）は、 CY2025 に 1,083.8M units （前年比 +18.4% ）となる見込み。

■ **5G 用 RF 部品**の市場は、 CY2025 に数量ベースで 12,069.4M pcs （ +16.5% ）、金額ベースで 6,427.9M ドル （ +6.9% ）となる見込み。

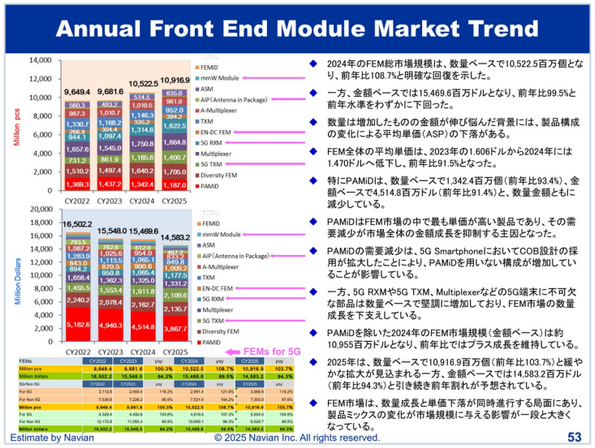
Cellular Terminal Annual Shipment History （ CY2001–CY2025 、 million units ）

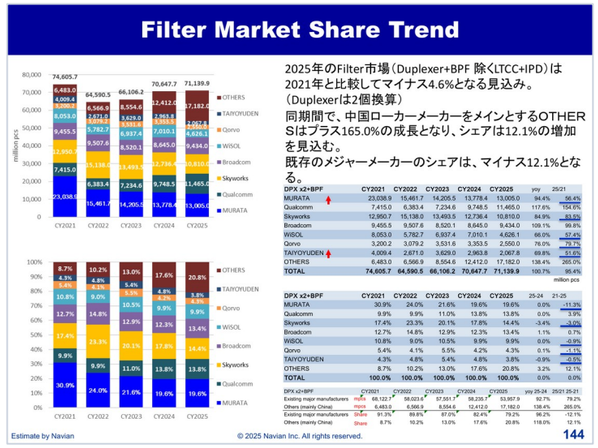


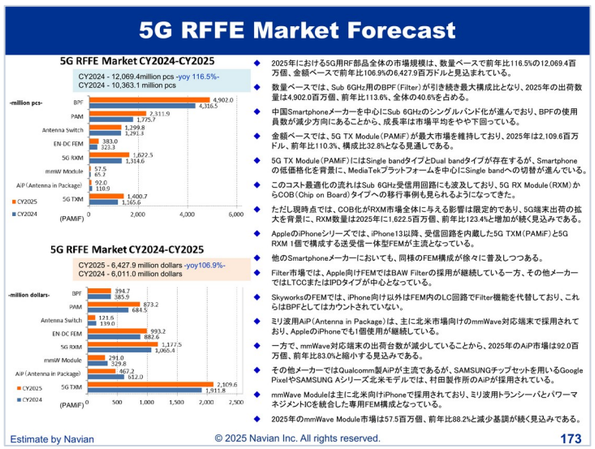
Product	'01	'02	'03	'04	'05	'06	'07	'08	'09	'10	'11	'12	'13	'14	'15	'16	'17	'18	'19	'20	'21	'22	'23	'24	'25	CAGR '20-'25	CAGR '14-'25	CAGR
Smart Phone	0.0	0.4	1.0	9.5	22.5	62.2	101.2	127.2	179.5	307.7	508.8	751.9	1,012.1	1,269.5	1,452.8	1,484.3	1,482.5	1,391.4	1,395.0	1,328.5	1,376.9	1,200.5	1,142.7	1,227.3	1,267.5	-0.9%	0.0%	-
OTHERS	345.0	439.5	548.0	674.5	834.5	1,047.5	1,260.4	1,282.3	1,257.7	1,352.8	1,257.8	1,027.8	813.3	605.4	529.3	501.4	519.1	688.5	739.2	769.2	953.9	1,003.5	986.0	1,111.4	1,255.5	10.3%	6.3%	5.5%
TOTAL	345.0	439.9	549.0	684.0	857.0	1,109.7	1,361.6	1,409.5	1,437.2	1,660.5	1,766.6	1,779.7	1,825.4	1,874.9	1,982.1	1,985.7	2,001.6	2,079.9	2,134.2	2,097.7	2,330.8	2,204.0	2,128.7	2,338.7	2,523.0	3.8%	2.5%	8.6%
yoy	83.3%	127.5%	124.8%	124.6%	125.3%	129.5%	122.7%	103.5%	102.0%	115.5%	106.4%	100.7%	102.6%	102.7%	105.7%	100.2%	100.8%	103.9%	102.6%	98.3%	111.1%	94.6%	96.6%	109.9%	107.9%			

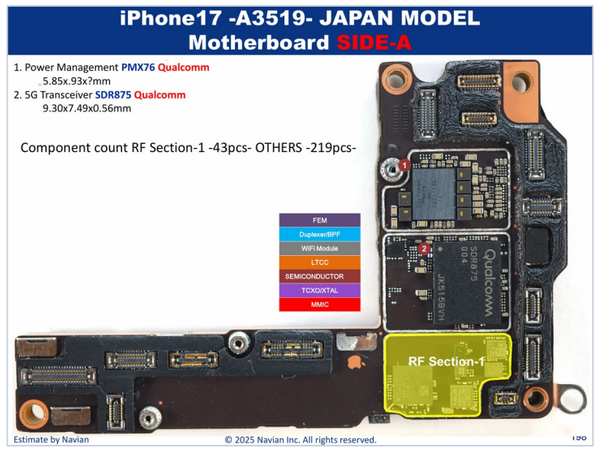
Million units

Report Samples









■ 資料発刊要領

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■ お問い合わせ・お申し込み先

有限会社 ナビアン 担当：安藤 嘉泰 **E-mail： andoh@navian.co.jp**
〒 167-0041 東京都杉並区善福寺 2-18-2 TEL 03-5303-1303 https://www.navian.co.jp

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MURATA XBAR vs. Broadcom FBAR for Apple WiFi7