

Navian Marketing Report

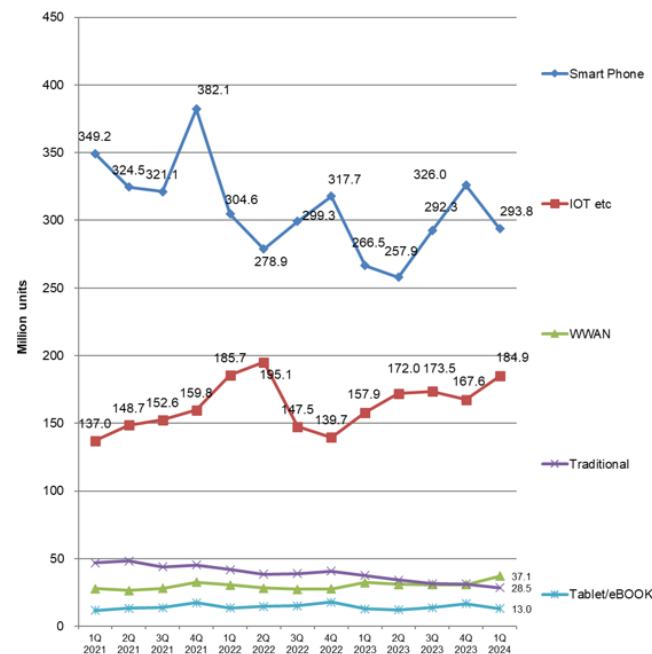
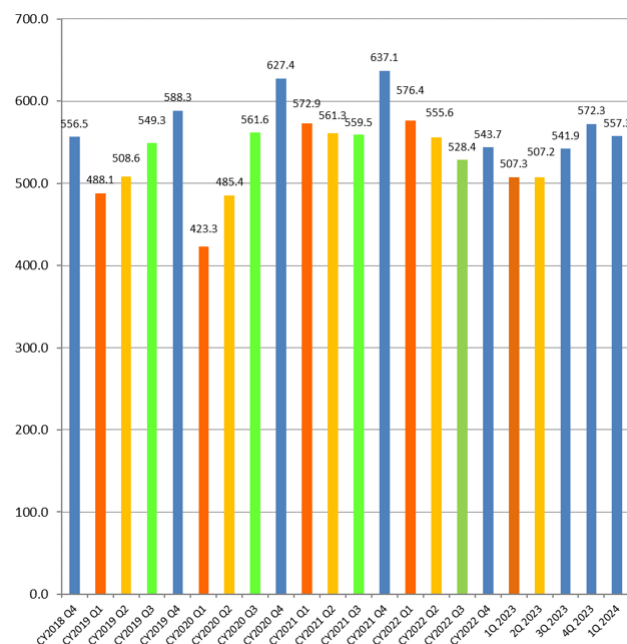
RF Devices/Modules For Cellular Terminal Quarterly Market Report Q1 2024

2024 年 8 月 6 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



e-Book Reader
Tablet PC



WWAN Terminal

Adapter



Embedded Module



Smart Phone



Traditional Handset

Mobile Phone



Fixed Wireless Terminal



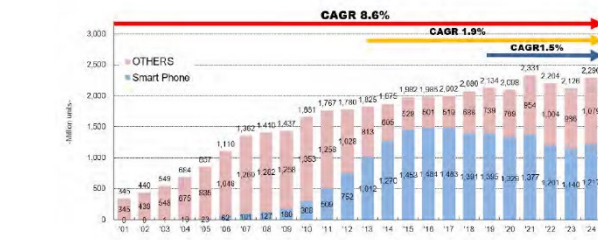
Non-Voice

Voice

Report Sample

Cellular Terminal Annual Shipment History CY2001-CY2023

- ◆ 2023年のCellular Terminalの出荷台数は、前年比94.6%の2,204.0million unitsとなった。
- ◆ 2022年に続いて2年連続のマイナス成長となったものの、2023年後半からは復調の傾向がみられ、2024はプラス成長が見込まれている。
- ◆ Smartphone・IOT等が中国市場を中心に回復している他、アフリカや東南アジアなどの新興国での需要拡大も貢献度が高まっているようだ。
- ◆ 2024年のCellular Terminalの出荷台数は、前年比108.0%の2,296.2million unitsが見込まれる。

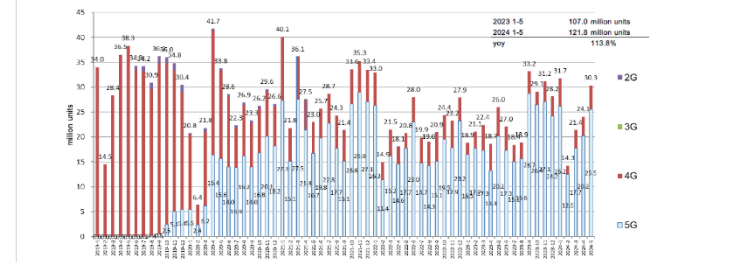


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Chinese Cellular Terminal Market ~2023年2月からプラス成長に~

- ◆ 下記のグラフは、中国通信研究院(CAICT)が毎月発表している中国国内向けの携帯電話 (Smartphone+Traditional handset) の出荷台数データをもとにナビアンが作成したもの。
- ◆ この出荷統計には、SmartphoneとTraditional handset (Futurephone) が含まれるが、現在の中国市場では殆どがSmartphoneとなっている。
- ◆ また、Cellular機能付きのタブレット端末やCellular IOT等の非音声端末は含まれていない。
- ◆ 2024年1月~5月の出荷台数は121.8million unitsで、前年同期比で113.8%と二桁増を回復した。
- ◆ また、5Gは102.2million unitsで前年比120.3%と大幅な伸びとなったが、これはHUAWEIが2023年後半から5G対応Smartphoneの出荷を開始したことが大きく貢献していると推定される。

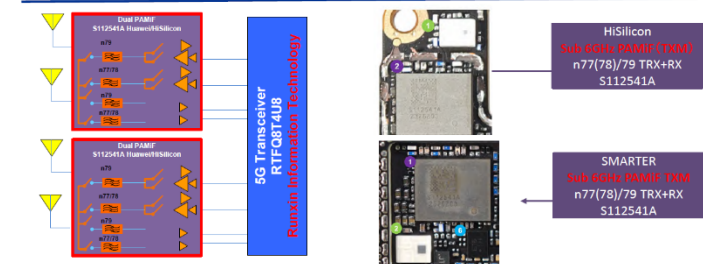


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Sub 6GHz RFFE of HUAWEI MATE 60 Pro

- ◆ HUAWEI MATE 60 ProのSub 6GHzの構成を下記に示す。
- ◆ Sub 6GHzのバンド数は、3.5GHz帯(n78)及び4.5GHz帯のデュアルバンドに対応し、MIMOの仕様は送信(TX) x2/受信(RX) x2の4x4 MIMOとなっている。
- ◆ Sub 6GHzのRFFEは、n77(78)とn79のDual band対応のPAMiF(S112541A)を2個使用する。
- ◆ このPAMiFは、HUAWEIの子会社HiSiliconの製品で、送受信回路の他MIMO用の受信回路も備え、2個組み合わせで使用することで送信(TX) x2/受信(RX) x2の4x4 MIMO回路を構成する。
- ◆ Sub 6GHz用のFilterはIPDと推定される。

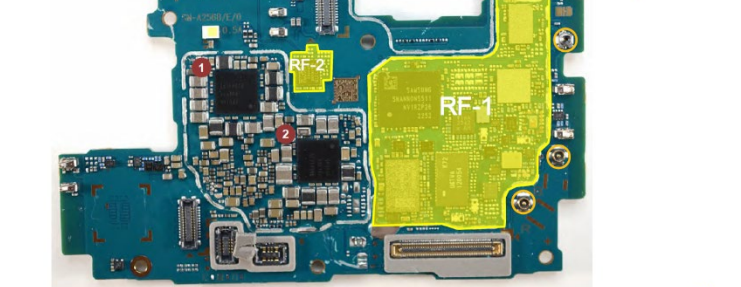


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Galaxy A25 5G Motherboard SIDE-A

- ◆ Component count OTHERpcs + RF-1 236pcs + RF-2 30pcs
- ◆ 1. Power Management M7335 MediaTek
- ◆ 2.12x1.38x0.82mm
- ◆ 2. XTAL unit with thermistor
- ◆ 2.55x2.65x0.77mm
- ◆ 6.02x5.65x0.61mm



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■資料発刊要領

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 - (2) Main RF Parts list & Duplexer/BPF Count
 - (3) Teardown pictures & RF Modules/Components
3. Tecno Pova 5 Pro
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Released 2023, August 22 -
 - (1) RF Circuit Block Diagram
 - (2) Main RF Parts list & Duplexer/BPF Count
 - (3) Teardown pictures & RF Modules/Components

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