

Global and China Mobile Phone RF (Radio Frequency) Industry Report, 2008-2009



Mobile phone RF system consists mainly of transceivers, power amplifier (abbreviated as PA thereafter) and antenna switch. PA might be set in the Front-End-Module or FEM. In 2G, the cost of RF system was only about US \$1.5, while In 3G, the cost was increased to between US\$6.0 and US\$8.0, and the cost will further increased to about US\$8.0 to US\$10.0 in 4G, obviously, FR system had the highest cost growth during the upgrading of mobile phones.

The receiver is a part of the mobile phone platform. Generally the mobile phone baseband vendors also provide the receivers, however, Nokia's baseband was from Texas Instruments, but its receiver was from ST Microelectronics or Infineon. ST Microelectronics has further enhanced its baseband ability through the consolidation between NXP and Ericsson mobile platform.

PA (Power Amplifier) is the most key component in a mobile phone, which decides the voice quality, connection time, standby time and signal strength. PA has been produced by compound semiconductor manufacturers all along, including RFMD, Skyworks, Triquint, Anadigics, Avago and Renesas. Renesas still relies on the previous products form Hitachi Semiconductor, launched none of any new products.

RFMD has always been the NO.1, but the gap between RFMD and Skyworks is shrinking gradually. RFMD relies much on Nokia and Motorola. 75% sales of RFMD are contributed by those two. On the other hand, above 90% PA of Nokia is from RFMD. Skyworks's main clients are Sony Ericsson, Motorola, LG and Samsung. The world's first 4G FEM containing PA was from Skyworks.

As the world's largest GaAs OEM, Triquint is good at high-integration PA, as well as the PA packaging. The GSM PA with the smallest footprint and the world's first FC packaged PA were both produced by Triquint. The main clients of Triquint are Samsung, LG, RIM and Apple.

Anadigics has a close relationship with Qualcomm, which is focused on the PA development for CDMA and WCDMA. Especially it has a high market share in CDMA market. Since its establishment, Anadigics has been expanding continuously, but during the past five years, only one year is profitable.

Avago was previously the semiconductor department (Agilent) of HP. Avago was the first one engaged in the WCDMA development. Though its sales did not look good initially, with the increasing popularity of WCDMA, the sales turned to increase rapidly.

In 3G era, RF system becomes more complex. Some smart mobile phones have as many as five PAs, one is for all GSM frequency bands, one is for WLAN and the other three are for three 3G frequency band separately. Considering the high integration is the further development focus for PA, Skyworks and

Triqunit have the biggest potential. 4G has much higher requirements to PA such as higher T/PR and higher efficiency. No matter in 2G or 3G, PA sector is always monopolized by compound semiconductor manufacturers; the traditional silicon semiconductors have no chances. PA was usually GaAs HBT in 2G, in 3G, new entrants tend to InGaP HBT, Skyworks had already acquired the PA department of Freescale. In 2009, Skyworks launched the world's first model FEM (SKY77445) focus on LTE/EUTRAN. Anadigics also has two models of PA for LTE/EUTRAN, both of them adopted InGaP.

Six Typical PA Models in 3G

| Vendor | Model | Base | Technics | Wave | Packaging | Launching |
|-----------|-----------|-----------|----------|---------|-----------|-----------|
| | | | | | | time |
| Freescale | MMM6032 | GaAs/SiGe | HBT | 1.2 | MCM | Jun.2005 |
| RFMD | RF5184 | GaAs | HBT | 1.2.5.8 | QFN | Sep.2008 |
| Avago | ACPM-7881 | GaAs | pHEMT | 1 | SMT | 2006 |
| Triquint | TQM676021 | InGaP | HBT | 1 | LGA | Feb.2009 |
| Anadigics | AWT6281 | InGaP | HBT | 2 | SMT | Feb.2009 |
| Skyworks | SKY77158 | InGaP | HBT | 1 | MCM | Mar.2008 |

Antenna switch is also has high entry barriers. Although its price is rather lower than PA and receiver, usually requiring SiP packaing and LTCC underlay. Globally, antenna switches are mainly supplied by Japanese vendors such as MURATA, Renesas and New JRC etc.



Table of Contents

- 1. Global Mobile Phone Market Developments
- 1.1 Market Overview
- 1.2 Market Developments
- 1.2.1 The Mobile Phone Internet
- 1.2.2 Extensively Application of HSPA
- 2. China's Mobile Phone Market Developments
- 2.1 Market Overview
- 2.2 Mobile Phone Export
- 2.3 Smart Mobile Phone Market
- 3. Introduction of RF Semiconductors
- 3.1 RF Circuit Structure
- 3.2 Techniques
- 4. Global Mobile Phone RF Market Developments
- 4.1 Global Market Scale
- 4.2 Global Frequency Allocation Forecast
- 4.3 Global Market Share Distribution of Global Handset RF Vendors

- 4.4 RF in 4G
- 4.5 Receiver in 4G
- 4.6 PA in 3G and 4G
- 4.7 WLAN Mobile Phone
- 5. Mobile Phone vendors
- 5.1 Nokia
- 5.2 Motorola
- 5.3 Samsung
- 5.4 Sony Ericsson
- 5.5 LG
- 5.6 Platform Research of Chinese Mobile Phone Vendors
- 5.6.1 K-Touch
- 5.6.2 Lenovo
- 5.6.3 Gionee
- 5.7 RF Configuration of Smart Phones
- 5.7.1 BlackBerry BOLD
- 5.7.2 BlackBerry STORM
- 5.7.3 HTC TOUCH
- 5.7.4 Sony Ericsson XPERIA X1



- 5.7.5 T-MOBILE T1
- 5.7.6 MOTO KRAVE ZN4
- 5.7.7 Nokia N95
- 5.7.8 APPLE IPHONE 16GB
- 6. Global Mobile Phone RF Semiconductor Vendors
- 6.1 SKYWORKS
- 6.2 ST-Ericsson
- 6.3 INFINEON
- 6.4 Silicon Lab
- 6.5 RFMD
- 6.6 Freescale
- 6.7AVAGO
- 6.8 QUALCOMM
- 6.9 ANADIGICS
- 6.10 TRIQUINT
- 6.11 MAXIM
- 6.12 Sirific Wireless
- 6.13 Sequoia Communications
- 6.14 Tropian
- 6.15 RENESAS
- 6.16 SiGe Semiconductor
- 6.17 Airoha Technology Corp.
- 6.18 Beijing LHWT Microelectronics Inc.

- 6.19 Epic Communications, Inc. (Epicom)
- 6.20 Yuantonix, Inc.
- 6.21 Comlent Technology, Inc. (Comlent)
- 6.22 Rising Micro-Electronics Co., Ltd. (RME)
- 6.23 RDA Microelectronics

Selected Charts

- Global Mobile Phone Shipment and Overall Proportion of Smart Phones, 2007-2012e
- Global Quarterly Mobile Phone Shipment and Its Growth, 2007-2008
- Regional Distribution of Global Mobile Phone Shipment, 2007-2008
- Global Market Share Distribution of Major Mobile Phone Vendors, 2008
- Global Market Share Distribution of Major Smart Phone Vendors, 1Q 2007-3 Q 2008
- Global Market Share Distribution of Major Smart Phone Vendors, 2008
- Mobile Phone Development Trend
- Mobile Phone Development Forecast, 1995-2012e
- Developments of Mobile Phone Communication Protocol Stack, 2008-2013e
- UMTS-HSPA Network Distribution in Latin America
- Mobile Phone Sales in China and overall Proportion of Smart Phones, 2004-2012e
- Mobile Phone Output in China, 2004-2012e
- China's Mobile Phone Export Volume, 1999-2008
- China's Mobile Phone Export Destinations, 2002-2008
- Market Share Distribution of Major Smart Phone Vendors in China, 2008
- RF Framework of Typical Wireless Terminal Equipments
- RF Components of Typical Wireless Telecom Terminal Equipments
- Framework of Super-heterodyne
- Framework of Homodyne
- Framework and Typical Application Diagram of Harley
- Framework of Weaver



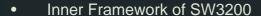


- Global Mobile Phone Frequency Distributions, 2009-2013e
- Global Market Share Distribution of Major Mobile Phone RF Receiver Vendors by Shipment, 2008
- Global Market Share Distribution of Major Mobile Phone PA Vendors, 2008
- Global Market Share Distribution of Major GSM PA Vendors, 2008
- Global Market Share Distribution of Major CDMA PA Vendors, 2008
- Global Market Share Distribution of Major WCDMA PA Vendors, 2008
- Global 4G Frequency Distributions
- Developments of Mobile Phone Power Amplifier, 2007-2022e
- Technical Capability of Major PA Vendors in the World
- Inner Framework of SKY77441
- Mobile Broadband User Qty., 2005-2012e
- Inner Framework of STLC4560
- Framework of WiLINK4.0
- Inner Framework of RF5924
- Quarterly Mobile Phone Shipment of Nokia in China, 2005Q3-2008Q4
- Quarterly Mobile Phone Shipment of Samsung, 2005Q1-2008Q4
- Quarterly Shipment and Average Selling Price of Sony Ericsson, 2005Q1-2008Q4
- Quarterly Shipment of LG, 2005Q4-2008Q4
- Organizational Structure of K-Touch
- Organizational Structure of Gionee
- Organizational Structure of JinMing Electronics
- Sales Revenue and Gross Profit Margin of SKYWORKS, 2002-2008
- Sales Revenues of SKYWORKS from Its Core Products, 2003-2008
- Regional Sales Revenues of SKYWORKS, 2005-2008



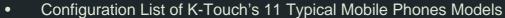
- Clients of SKYWORKS, 2007-2008
- Revenue Structure of ST, 2008
- Sales Revenue of ST, 2005-2008
- Regional Sales Revenue of ST, 2008
- Organizational Structure of ST
- Revenue of ST from Its Wireless Division, 2003-2008
- Quarterly Revenue of Infineon from Its Communication Division, 2006Q4-2008Q4
- Transceiver Shipment of Infineon, 2003-2007
- RF Chip Road Map of Infineon
- Inner Framework of PMB6952
- Sale Revenue and Gross Profit Margin of Silicon Lab, 2001-2005
- Sales Revenue and Gross Profit Margin of RFMD, 2001-2008
- Freescale's Revenue Structure, 2006-2008
- Sales Revenue and Gross Profit Margin of Avago , 2004-2008
- Avago's Revenue Structure, 2006-2008
- Wireless Products of Avago
- RF Products of Avago
- Inner Framework of WS1102
- Inner Framework of ACPM-7881
- Quarterly MSM Chip Shipment of Qualcomm, 2004-2008
- Regional RF Chip Distribution of Qualcomm
- Revenue and Gross Profit Margin of ANADIGICS, 2003-2008
- Main Clients of ANADIGICS
- Revenue and Gross Profit Margin of TRIQUINT, 2001-2008
- Inner Framework of SW2210





- Inner Framework of SW3210
- Inner Framework of PF08155B
- Inner Framework of RPF09025B
- Inner Framework of R2A60273
- Application of TRIQUINT's Products, 2005-2008
- Network Standard of TRIQUINT's Mobile Phones, 2005-2008
- Market Share Distribution of GaAs Wafer OEMs in 2007
- Core Competence of TRIQUINT's Mobile Phone Business
- Block Diagram of MAXIM TD-SCDMA RF System
- Block Diagram of MAXIM CDMA2000 Dual-band RF Solution
- Block Diagram of MAXIM CDMA2000 Single-band RF Solution
- Block Diagram of MAXIM WCDMA RF Solution
- Airoha's RF Products Development Roadmap
- Airoha WLAN RF Chip Products Development Roadmap
- Mobile Phone Shipment of Global Top13 Vendors in 2008
- Ranking of China Top 25 Mobile Phone Vendors by Output in 2008
- China's Top 23 Mobile Phone Export Destinations in 2008
- Six Typical Models of PA in 3G
- Comparison between HSPA and Mobile WiMAX
- Configuration List of Nokia's 30 Typical Mobile Phone Models
- Configuration List of Motorola's 3 Mobile Phones Models
- Configuration List of Samsung's 20 Typical Mobile Phones Models
- Sony Ericsson Mobile Platform
- Configuration List of LG's 17 Typical Mobile Phones Models





- Configuration List of Lenovo's 10 Typical Mobile Phone Models
- Configuration List of Gionee's 5 Typical Mobile Phones Models
- Configuration of Blackberry STORM
- HTC Touch ProBill of Materials
- Configuration of Sony Ericsson XPERIA X1
- Configuration of MOTO KRAVE ZN4
- Configuration of T-MOBILE T1
- Configuration f N95
- Configuration of APPLE IPHONE 16GB
- Four Production Bases of SKYWORKS
- GSM/GPRS/EDGE Power Amplifier Product List of SKYWORKS
- Receiver Product List of Infineon
- Receiver Product List of Silicon Lab
- RFMD's Quarterly Revenue and Gross Profit, 1Q2007-4Q2008
- Quarterly Revenue of Freescale's Mobile Phone Department, 1Q2006-4Q2008
- RF Product List of Freescale
- RF PA Product List of AVAGO
- Airoha's Main Products
- Main Products of LHWT Microelectronics
- Main Products of Epic Communications
- Wireless PA Product List of TALENT



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