Over the last decade, the GaN power market has been driven mostly by high-end, high-performance applications offering high-frequency switching, low on-resistance, and smaller form factor at system level. But things are changing for GaN power in 2019 - it’s entering mainstream consumer applications! Following its inclusion in several aftermarket chargers, Chinese OEM Oppo announced the adoption of a GaN HEMT device in its 65W inbox fast-chargers for its new Reno Ace flagship model. This is the first time GaN power devices have entered a high-volume smartphone market, and it is likely to be a real game-changer for GaN power.

In addition to the exciting consumer market, GaN is attracting lots of attention from various OEMs and Tier1s, i.e. Valeo and Continental in the automotive industry. Indeed, GaN is very interesting for emerging 48V DC/DC in mild hybrid electric vehicles and on-board chargers in electrified vehicles. Players like EPC and Transphorm have already obtained AEC qualification, and GaN Systems, which benefits from its BMW i Ventures investment, expects qualification by next year. These device manufacturers are working closely with packaging companies like ASE, AT&S, and Schweizer to enter the OEM supply chain and enjoy increasing volumes starting in 2023 - 2024 according to Yole Développement.

GaN is also expected to penetrate industrial and telecom power supply applications including datacom, base stations, UPS, and industrial LiDAR applications. Following the first small-volume adoption of GaN-based power supplies by Eteck, Delta, and BelPower over the last few years, Yole analysts’ expect broader penetration of GaN in the near future, with increasing efficiency requirements in data centers benefiting from enhanced GaN device maturity + cost-competitiveness.

Overall, compared to Yole’s 2018 report and its two market scenarios, this year’s market forecast is much brighter than 2018’s base-case thanks to GaN’s adoption in Oppo’s inbox fast chargers. Driven mainly by such consumer fast-charger applications, Yole projects that the GaN power business will exceed $350M by 2024, with a compound annual growth rate (CAGR) of 85%.

This report conveys Yole’s understanding of GaN device implementation in different market segments, as well as our insights regarding the market’s current dynamics and future evolution.

THE GaN POWER MARKET ACHIEVES ITS FIRST MILESTONE

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have managed to enter at least 50 aftermarket fast-charger brands, including Ravpower, Anker, and Aukey. As mentioned earlier, one of the year’s most significant developments was Oppo’s adoption of GaN HEMTs for 65W inbox fast charging in its high-end model. What other possible market scenarios exist for GaN adoption in this mass market?

Yole anticipates proliferation of Chinese OEM challengers such as Oppo, Vivo, and Xiaomi in the emerging 5G luxury smartphone business, which demands significant technology differentiation. Oppo’s SuperVOOC 2.0 meets these demands, with its reduced charging time and charger size. Other Chinese OEMs have also announced very high-power fast charging (beyond 100W), and could potentially adopt GaN devices in the coming years. In light of these prospective achievements, the overall GaN device market is nominally expected to surpass $350M by 2024.

In a more optimistic scenario (and in addition to Chinese OEMs deploying high-power fast chargers), GaN could also be adopted by other players - including leading OEMs like Apple, Huawei, and Samsung - after achieving high maturity and market acceptance as well as cost-competitiveness compared to Si MOSFETs. In the best-case, this could create truly remarkable market opportunities.

In either of these scenarios, Yole analysts’ expect significant growth: a CAGR of at least 92% from 2018 - 2024 for the GaN-based power supply market.

In this report, Yole invites you to discover diverse market scenarios for GaN-based consumer fast-charging applications, and broaden your understanding of GaN’s innovative technology and landscape.

For many years the GaN power device landscape was dominated by pure GaN start-up players like EPC, GaN Systems, Transphorm, and Navitas, which chose the foundry model and mostly used TSMC, Episil, or X-FAB. But with the GaN market’s resurgence, more and more players are arriving. Recently, new foundries have also announced very high-power fast charging (beyond 100W), and could potentially adopt GaN devices in the coming years. In light of these prospective achievements, the overall GaN device market is nominally expected to surpass $350M by 2024.

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between all of these actors and their benefit. A fierce competition is likely to break production capacity to derive considerable their GaN-on-sapphire know-how and high LED manufacturers may want to leverage from high-volume opportunities. For example, more players are expected to enter and benefit In a GaN power market bursting with potential, mainstream GaN-on-Si technology.

- a considerable departure from today's technology is influenced by GaN-on-sapphire integration technologies like SiP and SoC, and compares them to discrete devices.

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Founded in 1998, Yole Développement (Yole) has grown to become a group of companies providing marketing, technology and strategy consulting, media and corporate finance services, reverse engineering and reverse costing services and well as IP and patent analysis. With a strong focus on emerging applications using silicon and/or micro manufacturing, the Yole group of companies has expanded to include more than 120 collaborators worldwide covering MEMS and image sensors, Compound semiconductors, RF Electronics, Solid-state lighting, Displays, Software, Optoelectronics, Microfluidics & Medical, Advanced Packaging, Manufacturing, Power Electronics, Batteries & Energy Management and Memory.

The “More than Moore” market research, technology and strategy consulting company Yole Développement, along with its partners System Plus Consulting, PISEO, KnowMade and Blumorpho, supports industrial companies, investors and R&D organizations worldwide to help them understand markets and follow technology trends to grow their business.

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