

5G Chipsets Market by Type (Modems, RFICs), Frequency (Sub - 6 GHz, 24 - 29 GHz, Above 39 GHz), Process Node (Less than 10 nm, 10 to 28 nm, Above 28 nm), End-use (Telecommunication Infrastructure, Mobile Devices) and Region - Global Forecast to 2028

Market Report | 2023-03-08 | 227 pages | MarketsandMarkets

AVAILABLE LICENSES:

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

Report description:

The 5G Chipsets market is projected to reach USD 81.0 billion by 2028, growing at a CAGR of 17.4% from 2023 to 2028. This report covers key end-uses, namely, Telecommunication Infrastructure, Mobile Devices, Non-mobile Devices, and Automobiles.

"The Modems segment is projected to grow at a sizable CAGR in the market during the forecast period."

The modem or baseband processor converts the data to a signal that can be used to modulate the carrier frequency for transmission and vice versa. A baseband processor is a chip in a device, such as a smartphone or a tablet, that handles cellular transmission. These are widely used in radio frequency (RF) and wireless communications. Qualcomm Technologies, Inc. (US); MediaTek Inc. (Taiwan); and Huawei Technologies Co., Ltd. (China) are some of the eminent 5G modem providers.

"By end-use, the market for automobile segment is expected to grow at highest CAGR in the market"

5G is expected to be crucial in transforming the automotive industry. It will develop new applications that are difficult to advance with the current generation of cellular technologies. 5G can allow system and application developers to offer a wide range of operations. Modern automobiles utilize vehicle-to-vehicle (V2V), vehicle-to-infrastructure (V2I), vehicle-to-pedestrian (V2P), and vehicle-to-network (V2N) technologies. It would further help develop other applications, such as automated driving, digital logistics, and intelligent navigation. 5G network provides fast connectivity at low latency. Moreover, the 5G network data transfer rate is higher than that of the previous generation. Hence, 5G will play an integral role in autonomous driving.

"Europe to grow at the highest rate in the 5G Chipsets market."

In collaboration with chip manufacturers, the European government aims to diversify its fabs and all parts of the semiconductor

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

supply chain, including assembly and testing. They seek to move chipmaking out of the traditional strongholds (Asia Pacific region) into North America and Europe (Italy, Germany, the Netherlands, Spain, the UK, and Norway). Europe has set ambitious targets to grow its chip manufacturing capacity from 9% (FY2020) to 20% (FY2030) over the same period. The region comprises some key countries adopting Industry 4.0 and IoT and connected cars at a higher rate. The adoption of these technologies is mainly dependent on connectivity, and the 5G network is anticipated to play an integral role in developing the European market.

Break-up of the profiles of primary participants:

- By Company Type - Tier 1 - 25%, Tier 2 - 30%, and Tier 3 - 45%
- By Designation - C-level - 30%, Director-level - 40%, and Other - 30%
- By Region - North America - 30%, Europe - 20%, APAC - 40%, and RoW - 10%

The key players operating in the 5G Chipsets market include Qualcomm Technologies, Inc. (US), MediaTek Inc. (Taiwan), Huawei Technologies Co., Ltd. (China), SAMSUNG (South Korea), and Broadcom (US), Qorvo, Inc (US), Skyworks Solutions, Inc. (US), Analog Devices, Inc. (US), Marvell (US), Anokiwave, Inc (US), NXP Semiconductors (Netherlands), Xilinx (Acquired by AMD) (US), Texas Instruments Incorporated (US), Murata Manufacturing Co., Ltd. (Japan), Renesas Electronics Corporation (Japan), Infineon Technologies AG (Germany), MACOM (US), u-blox (Switzerland), Siivers IMA (Sweden), Unisoc (Shanghai) Technologies Co., Ltd. (China), Arm Limited (UK), Cadence Design Systems, Inc. (US), Fibocom Wireless Inc. (China), Quectel (China), and OMMIC (France). The study includes an in-depth competitive analysis of these key players in the 5G Chipsets market with their company profiles, recent developments, and key market strategies.

Research Coverage:

This research report categorizes the 5G Chipsets market based on Type, End - Use, Process Node, and Frequency and region. The report describes the major drivers, restraints, challenges, and opportunities pertaining to the 5G Chipsets market and forecasts the same till 2028. Apart from these, the report also consists of leadership mapping and analysis of all the companies included in the 5G Chipsets ecosystem.

Key Benefits of Buying the Report

The report would help leaders/new entrants in this market in the following ways:

- 1.□This report segments the 5G Chipsets market comprehensively and provides the closest market size projection for all subsegments across different regions.
- 2.□The report helps stakeholders understand the pulse of the market and provides them with information on key drivers, restraints, challenges, and opportunities for market growth.
- 3.□This report would help stakeholders understand their competitors better and gain more insights to improve their position in the business. The competitive landscape section includes competitor ecosystem, product developments and launches, partnerships, and mergers and acquisitions.
- 4.□The analysis of the top 25 companies, based on the market rank as well as the product footprint will help stakeholders visualize the market positioning of these key players.
- 5.□Patent analysis, trade data, and technological trends that will shape the market in the coming years has also been covered in this report.

Table of Contents:

- 1□INTRODUCTION□28
- 1.1□STUDY OBJECTIVES□28
- 1.2□MARKET DEFINITION□28
- 1.2.1□INCLUSIONS AND EXCLUSIONS□29
- 1.3□STUDY SCOPE□29
- 1.3.1□MARKETS COVERED□29
- 1.3.2□REGIONAL SCOPE□30

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

1.3.3	YEARS CONSIDERED	30
1.4	CURRENCY CONSIDERED	30
1.5	LIMITATIONS	31
1.6	STAKEHOLDERS	31
1.7	SUMMARY OF CHANGES	31
2	RESEARCH METHODOLOGY	32
2.1	RESEARCH DATA	32
	FIGURE 1 RESEARCH DESIGN	32
2.1.1	SECONDARY AND PRIMARY RESEARCH	33
2.1.2	SECONDARY DATA	34
2.1.2.1	Major secondary sources	34
2.1.2.2	Secondary sources	34
2.1.3	PRIMARY DATA	35
2.1.3.1	Primary interviews with experts	35
2.1.3.2	Primary sources	35
2.1.3.3	Breakdown of primaries	36
2.1.3.4	Key industry insights	36
2.2	MARKET SIZE ESTIMATION	36
2.2.1	BOTTOM-UP APPROACH	37
2.2.1.1	Approach to derive market share using bottom-up analysis (demand side)	37
	FIGURE 2 BOTTOM-UP APPROACH	37
2.2.2	TOP-DOWN APPROACH	38
2.2.2.1	Approach to derive market share using top-down analysis (supply side)	38
	FIGURE 3 TOP-DOWN APPROACH	38
2.3	MARKET BREAKDOWN AND DATA TRIANGULATION	39
	FIGURE 4 DATA TRIANGULATION	39
2.4	RESEARCH ASSUMPTIONS	40
2.5	ASSUMPTIONS RELATED TO RECESSION	40
	TABLE 1 ASSUMPTIONS RELATED TO RECESSION	40
3	EXECUTIVE SUMMARY	41
3.1	GROWTH RATE ASSUMPTIONS/FORECASTS	41
3.2	RECESSION IMPACT ANALYSIS	42
	FIGURE 5 GDP GROWTH PROJECTIONS TILL 2023 FOR MAJOR ECONOMIES	43
	FIGURE 6 PROJECTIONS FOR 5G CHIPSETS MARKET, 2019-2028	43
	FIGURE 7 YEARLY GROWTH TREND IN 5G CHIPSETS MARKET	44
	TABLE 2 5G CHIPSETS MARKET, 2019-2022 (USD BILLION)	44
	TABLE 3 5G CHIPSETS MARKET, 2023-2028 (USD BILLION)	44
	FIGURE 8 RFICS SEGMENT TO ACCOUNT FOR LARGER SHARE OF 5G CHIPSETS MARKET DURING FORECAST PERIOD	45
	FIGURE 9 AUTOMOBILE SEGMENT TO REGISTER HIGHEST CAGR IN 5G CHIPSETS MARKET DURING FORECAST PERIOD	45
	FIGURE 10 10-28 NM SEGMENT TO HOLD LARGEST SHARE OF 5G CHIPSETS MARKET IN 2028	46
	FIGURE 11 ASIA PACIFIC TO ACCOUNT FOR LARGEST SHARE OF 5G CHIPSETS MARKET DURING FORECAST PERIOD	46
4	PREMIUM INSIGHTS	48
4.1	ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN 5G CHIPSETS MARKET	48
	FIGURE 12 GROWING DEMAND FOR HIGH-SPEED INTERNET AND BROAD NETWORK COVERAGE	48
4.2	5G CHIPSETS MARKET FOR MOBILE DEVICES, BY END USE	48
	FIGURE 13 WEARABLES SEGMENT TO REGISTER HIGHEST CAGR BETWEEN 2023 AND 2028	48
4.3	5G CHIPSETS MARKET FOR TELECOMMUNICATION INFRASTRUCTURE, BY END USE	49

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

FIGURE 14 CPE SEGMENT TO EXHIBIT HIGHEST CAGR BETWEEN 2023 AND 2028 49

4.4 ASIA PACIFIC 5G CHIPSETS MARKET, BY END USE AND COUNTRY 49

FIGURE 15 MOBILE DEVICES SEGMENT AND CHINA TO HOLD LARGEST SHARES OF ASIA PACIFIC 5G CHIPSETS MARKET IN 2023 49

4.5 5G CHIPSETS MARKET, BY FREQUENCY 50

FIGURE 16 SUB-6 GHZ SEGMENT TO HOLD LARGEST SHARE OF 5G CHIPSET MARKET IN 2028 50

4.6 5G CHIPSETS MARKET, BY REGION 50

FIGURE 17 EUROPE TO RECORD HIGHEST CAGR BETWEEN 2023 AND 2028 50

5 MARKET OVERVIEW 51

5.1 INTRODUCTION 51

5.2 MARKET DYNAMICS 52

FIGURE 18 5G CHIPSETS MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES 52

5.2.1 DRIVERS 52

5.2.1.1 Rising demand for high-speed internet and broad network coverage 53

FIGURE 19 GLOBAL MOBILE SUBSCRIPTIONS PER 100 PEOPLE 53

5.2.1.2 High use of M2M communication technology 54

FIGURE 20 GLOBAL IOT CONNECTIONS, 2020 VS. 2026 54

FIGURE 21 GLOBAL M2M CONNECTIONS (BILLION UNITS) 54

5.2.1.3 Growing mobile data traffic 55

FIGURE 22 MOBILE 5G DATA TRAFFIC, 2018-2028 (EB PER MONTH) 55

FIGURE 23 GLOBAL MOBILE DATA USAGE, 2022 VS. 2028 56

5.2.2 RESTRAINTS 56

5.2.2.1 High cost of 5G chipsets for mobile devices 56

5.2.3 OPPORTUNITIES 57

5.2.3.1 Rising demand for 5G network in automobiles, smart cities, and healthcare sector 57

5.2.3.2 Emergence of private 5G networks to address wireless communication requirements in industrial IoT 57

TABLE 4 USE CASES FOR PRIVATE 5G 57

5.2.4 CHALLENGES 58

5.2.4.1 Design challenges for RF devices operating at higher frequency 58

5.3 VALUE CHAIN ANALYSIS 58

FIGURE 24 5G CHIPSETS MARKET: VALUE CHAIN ANALYSIS 59

TABLE 5 5G CHIPSETS MARKET: VALUE CHAIN ANALYSIS 59

5.4 5G ECOSYSTEM ANALYSIS 61

FIGURE 25 5G TECHNOLOGY ECOSYSTEM 61

5.5 PORTER'S FIVE FORCES ANALYSIS 62

TABLE 6 5G CHIPSETS MARKET: PORTER'S FIVE FORCES ANALYSIS 62

5.6 PRICING ANALYSIS 63

FIGURE 26 AVERAGE SELLING PRICE OF 5G CHIPSETS, BY END USE 64

FIGURE 27 GLOBAL AVERAGE PRICE TREND OF 5G CHIPSETS 64

TABLE 7 AVERAGE PRICE OF 5G CHIPSET COMPONENTS 64

5.7 PATENT ANALYSIS 65

FIGURE 28 5G CHIPSETS MARKET: PATENT ANALYSIS 65

TABLE 8 RECENT PATENT REGISTRATIONS 65

5.8 TRADE ANALYSIS 66

TABLE 9 EXPORT DATA FOR ELECTRONIC INTEGRATED CIRCUITS, BY COUNTRY, 2017-2021 66

FIGURE 29 EXPORT DATA FOR HS CODE 854231, BY COUNTRY, 2017-2021 (USD MILLION) 66

TABLE 10 IMPORT DATA FOR ELECTRONIC INTEGRATED CIRCUITS, BY COUNTRY, 2017-2021 67

FIGURE 30 IMPORT DATA FOR HS CODE 854231, BY COUNTRY, 2017-2021 (USD MILLION) 67

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.9 TARIFF AND REGULATORY LANDSCAPE 67

5.9.1 REGULATORY LANDSCAPE 68

5.9.2 TARIFF 69

TABLE 11 TARIFF FOR ELECTRONIC INTEGRATED CIRCUITS AS PROCESSORS AND CONTROLLERS EXPORTED BY US, 2021 69

TABLE 12 TARIFF FOR ELECTRONIC INTEGRATED CIRCUITS AS PROCESSORS AND CONTROLLERS EXPORTED BY CHINA, 2021 69

TABLE 13 TARIFF FOR ELECTRONIC INTEGRATED CIRCUITS AS PROCESSORS AND CONTROLLERS EXPORTED BY GERMANY, 2021 70

5.10 CASE STUDY ANALYSIS 70

5.10.1 US CELLULAR USES ERICSSON'S 5G MMWAVE EXTENDED RANGE FWA SERVICES TO DELIVER HIGH-SPEED BROADBAND SERVICES 70

5.10.2 US ASS AND ERICSSON CONNECTED GREENLAND WITH 5G 70

5.10.3 INSEEGO'S 5G SOLUTIONS ENHANCED DIGITAL INFRASTRUCTURES OF SMART CITIES IN SOUTHERN EUROPE 71

5.11 TECHNOLOGY ANALYSIS 71

FIGURE 31 5G CAPABILITIES 72

5.11.1 COMPLEMENTARY TECHNOLOGY 72

5.11.1.1 Message queuing telemetry transport (MQTT) 72

5.11.1.2 Massive multiple input, multiple output (MIMO) 73

5.11.2 ADJACENT TECHNOLOGY 73

5.11.2.1 Internet of Things (IoT) 73

5.11.2.2 Network slicing in radio access network (RAN) 74

6 5G CHIPSETS MARKET, BY TYPE 75

6.1 INTRODUCTION 76

FIGURE 32 RFICS SEGMENT TO DOMINATE 5G CHIPSETS MARKET DURING FORECAST PERIOD 76

TABLE 14 5G CHIPSETS MARKET, BY TYPE, 2019-2022 (USD MILLION) 76

TABLE 15 5G CHIPSETS MARKET, BY TYPE, 2023-2028 (USD MILLION) 76

6.2 MODEMS 77

6.2.1 HIGH USE OF 5G BASEBAND PROCESSORS IN SMARTPHONES 77

TABLE 16 MODEMS: 5G CHIPSETS MARKET, BY END USE, 2019-2022 (USD MILLION) 77

TABLE 17 MODEMS: 5G CHIPSETS MARKET, BY END USE, 2023-2028 (USD MILLION) 77

TABLE 18 MODEMS: 5G CHIPSETS MARKET, BY END USE, 2019-2022 (MILLION UNITS) 78

TABLE 19 MODEMS: 5G CHIPSETS MARKET, BY END USE, 2023-2028 (MILLION UNITS) 78

TABLE 20 MODEMS: 5G CHIPSETS MARKET, BY TELECOMMUNICATION INFRASTRUCTURE, 2019-2022 (USD MILLION) 78

TABLE 21 MODEMS: 5G CHIPSETS MARKET, BY TELECOMMUNICATION INFRASTRUCTURE, 2023-2028 (USD MILLION) 78

FIGURE 33 SMARTPHONES SEGMENT TO HOLD LARGEST SHARE OF 5G CHIPSETS MARKET FOR MODEMS DURING FORECAST PERIOD 79

TABLE 22 MODEMS: 5G CHIPSETS MARKET, BY MOBILE DEVICES, 2019-2022 (USD MILLION) 79

TABLE 23 MODEMS: 5G CHIPSETS MARKET, BY MOBILE DEVICES, 2023-2028 (USD MILLION) 79

TABLE 24 MODEMS: 5G CHIPSETS MARKET, BY MOBILE DEVICE, 2019-2022 (MILLION UNITS) 80

TABLE 25 MODEMS: 5G CHIPSETS MARKET, BY MOBILE DEVICES, 2023-2028 (MILLION UNITS) 80

TABLE 26 MODEMS: 5G CHIPSETS MARKET, BY NON-MOBILE DEVICES, 2019-2022 (USD MILLION) 80

TABLE 27 MODEMS: 5G CHIPSETS MARKET, BY NON-MOBILE DEVICE, 2023-2028 (USD MILLION) 80

6.3 RADIO FREQUENCY INTEGRATED CIRCUITS (RFICS) 81

6.3.1 CRUCIAL ROLE IN DESIGNING 5G CHIPSETS 81

FIGURE 34 RF TRANSCEIVERS SEGMENT TO REGISTER HIGHER CAGR IN 5G CHIPSETS MARKET FOR RFICS DURING FORECAST PERIOD 81

TABLE 28 RFICS: 5G CHIPSETS MARKET, BY END USE, 2019-2022 (USD MILLION) 81

TABLE 29 RFICS: 5G CHIPSETS MARKET, BY END USE, 2023-2028 (USD MILLION) 82

TABLE 30 RFICS: 5G CHIPSETS MARKET, BY END USE, 2019-2022 (MILLION UNITS) 82

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 31 RFICS: 5G CHIPSETS MARKET, BY END USE, 2023-2028 (MILLION UNITS) 82

TABLE 32 RFICS: 5G CHIPSETS MARKET, BY TELECOMMUNICATION INFRASTRUCTURE, 2019-2022 (USD MILLION) 82

TABLE 33 RFICS: 5G CHIPSETS MARKET, BY TELECOMMUNICATION INFRASTRUCTURE, 2023-2028 (USD MILLION) 83

TABLE 34 RFICS: 5G CHIPSETS MARKET, BY MOBILE DEVICES, 2019-2022 (USD MILLION) 83

TABLE 35 RFICS: 5G CHIPSETS MARKET, BY MOBILE DEVICES, 2023-2028 (USD MILLION) 83

TABLE 36 RFICS: 5G CHIPSETS MARKET, BY MOBILE DEVICE, 2019-2022 (MILLION UNITS) 84

TABLE 37 RFICS: 5G CHIPSETS MARKET, BY MOBILE DEVICES, 2023-2028 (MILLION UNITS) 84

TABLE 38 RFICS: 5G CHIPSETS MARKET, BY NON-MOBILE DEVICES, 2019-2022 (USD MILLION) 84

TABLE 39 RFICS: 5G CHIPSETS MARKET, BY NON-MOBILE DEVICE, 2023-2028 (USD MILLION) 84

TABLE 40 RFICS: 5G CHIPSETS MARKET, BY NON-MOBILE DEVICE, 2019-2022 (MILLION UNITS) 85

TABLE 41 RFICS: 5G CHIPSETS MARKET, BY NON-MOBILE DEVICES, 2023-2028 (MILLION UNITS) 85

TABLE 42 5G CHIPSETS MARKET, BY RFICS TYPE, 2019-2022 (USD MILLION) 85

TABLE 43 5G CHIPSETS MARKET, BY RFICS TYPE, 2023-2028 (USD MILLION) 85

6.3.2 RF TRANSCEIVERS 86

6.3.2.1 Increasing demand for wideband RF transceivers in 5G communication 86

TABLE 44 RF TRANSCEIVERS: 5G CHIPSETS MARKET, BY END USE, 2019-2022 (USD MILLION) 86

TABLE 45 RF TRANSCEIVERS: 5G CHIPSETS MARKET, BY END USE, 2023-2028 (USD MILLION) 86

TABLE 46 RF TRANSCEIVERS: 5G CHIPSETS MARKET, BY END USE, 2019-2022 (MILLION UNITS) 87

TABLE 47 RF TRANSCEIVERS: 5G CHIPSETS MARKET, BY END USE, 2023-2028 (MILLION UNITS) 87

6.3.3 RF FE 87

6.3.3.1 Power amplifiers 87

6.3.3.1.1 Increasing applications of GaN-based power amplifiers in base stations 87

6.3.3.2 Switches 88

6.3.3.2.1 Technological advancements in telecom industry 88

6.3.3.3 Low-noise amplifiers 88

6.3.3.3.1 Increased applications of low-noise amplifiers (LNAs) in automobiles, consumer devices, and telecom equipment 88

6.3.3.4 Filters 88

6.3.3.4.1 Evolution of filters to become smaller, highly integrated, and handle higher power 88

6.3.3.5 Others 89

TABLE 48 RF FE: 5G CHIPSETS MARKET, BY END USE, 2019-2022 (USD MILLION) 89

TABLE 49 RF FE: 5G CHIPSETS MARKET, BY END USE, 2023-2028 (USD MILLION) 89

TABLE 50 RF FE: 5G CHIPSETS MARKET, BY END USE, 2019-2022 (MILLION UNITS) 90

TABLE 51 RF FE: 5G CHIPSETS MARKET, BY END USE, 2023-2028 (MILLION UNITS) 90

7 5G CHIPSETS MARKET, BY END USE 91

7.1 INTRODUCTION 92

FIGURE 35 MOBILE DEVICES SEGMENT TO HOLD LARGEST SHARE OF 5G CHIPSETS MARKET DURING FORECAST PERIOD 92

TABLE 52 5G CHIPSETS MARKET, BY END USE, 2019-2022 (USD MILLION) 92

TABLE 53 5G CHIPSETS MARKET, BY END USE, 2023-2028 (USD MILLION) 93

TABLE 54 AVAILABILITY OF 5G DEVICES 93

7.2 TELECOMMUNICATION INFRASTRUCTURE 93

TABLE 55 TELECOMMUNICATION INFRASTRUCTURE: 5G CHIPSETS MARKET, BY TYPE, 2019-2022 (USD MILLION) 94

TABLE 56 TELECOMMUNICATION INFRASTRUCTURE: 5G CHIPSETS MARKET, BY TYPE, 2023-2028 (USD MILLION) 94

TABLE 57 TELECOMMUNICATION INFRASTRUCTURE: 5G CHIPSETS MARKET, BY REGION, 2019-2022 (USD MILLION) 94

TABLE 58 TELECOMMUNICATION INFRASTRUCTURE: 5G CHIPSETS MARKET, BY REGION, 2023-2028 (USD MILLION) 95

7.2.1 MACRO CELL 95

7.2.1.1 Features large coverage area and high-efficiency output 95

TABLE 59 MACRO CELL: 5G CHIPSETS MARKET, BY TYPE, 2019-2022 (USD MILLION) 95

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 60 □ MACRO CELL: 5G CHIPSETS MARKET, BY TYPE, 2023-2028 (USD MILLION) □95

TABLE 61 □ MACRO CELL: 5G CHIPSETS MARKET FOR RFICS, BY TYPE, 2019-2022 (USD MILLION) □96

TABLE 62 □ MACRO CELL: 5G CHIPSETS MARKET FOR RFICS, BY TYPE, 2023-2028 (USD MILLION) □96

FIGURE 36 □ NORTH AMERICA TO REGISTER HIGHEST CAGR IN 5G CHIPSETS MARKET FOR MACRO CELLS DURING FORECAST PERIOD □96

TABLE 63 □ MACRO CELL: 5G CHIPSETS MARKET, BY REGION, 2019-2022 (USD MILLION) □96

TABLE 64 □ MACRO CELL: 5G CHIPSETS MARKET, BY REGION, 2023-2028 (USD MILLION) □97

7.2.2 □ SMALL CELLS □97

7.2.2.1 □ Essential for applications demanding high bandwidth □97

TABLE 65 □ SMALL CELLS: 5G CHIPSETS MARKET, BY TYPE, 2019-2022 (USD MILLION) □97

TABLE 66 □ SMALL CELLS: 5G CHIPSETS MARKET, BY TYPE, 2023-2028 (USD MILLION) □98

TABLE 67 □ SMALL CELLS: 5G CHIPSETS MARKET, BY REGION, 2019-2022 (USD MILLION) □98

TABLE 68 □ SMALL CELLS: 5G CHIPSETS MARKET, BY REGION, 2023-2028 (USD MILLION) □98

7.2.3 □ CUSTOMER PREMISES EQUIPMENT (CPE) □98

7.2.3.1 □ Rising demand in various industries □98

TABLE 69 □ CPE: 5G CHIPSETS MARKET, BY TYPE, 2019-2022 (USD MILLION) □99

TABLE 70 □ CPE: 5G CHIPSETS MARKET, BY TYPE, 2023-2028 (USD MILLION) □99

TABLE 71 □ CPE: 5G CHIPSETS MARKET, BY REGION, 2019-2022 (USD MILLION) □99

TABLE 72 □ CPE: 5G CHIPSETS MARKET, BY REGION, 2023-2028 (USD MILLION) □100

7.3 □ MOBILE DEVICES □100

FIGURE 37 □ SMARTPHONES SEGMENT TO ACCOUNT FOR LARGEST SHARE OF 5G CHIPSETS MARKET FOR MOBILE DEVICES DURING FORECAST PERIOD □100

TABLE 73 □ MOBILE DEVICES: 5G CHIPSETS MARKET, BY TYPE, 2019-2022 (USD MILLION) □101

TABLE 74 □ MOBILE DEVICES: 5G CHIPSETS MARKET, BY TYPE, 2023-2028 (USD MILLION) □101

TABLE 75 □ MOBILE DEVICES: 5G CHIPSETS MARKET, BY REGION, 2019-2022 (USD MILLION) □101

TABLE 76 □ MOBILE DEVICES: 5G CHIPSETS MARKET, BY REGION, 2023-2028 (USD MILLION) □102

7.3.1 □ SMARTPHONES □102

7.3.1.1 □ Rising demand for 5G smartphones □102

FIGURE 38 □ MODEMS SEGMENT TO HOLD LARGER SHARE OF 5G CHIPSETS MARKET FOR SMARTPHONES DURING FORECAST PERIOD □102

TABLE 77 □ SMARTPHONES: 5G CHIPSETS MARKET, BY TYPE, 2019-2022 (USD MILLION) □103

TABLE 78 □ SMARTPHONES: 5G CHIPSETS MARKET, BY TYPE, 2023-2028 (USD MILLION) □103

TABLE 79 □ SMARTPHONES: 5G CHIPSETS MARKET FOR RFICS, BY TYPE, 2019-2022 (USD MILLION) □103

TABLE 80 □ SMARTPHONES: 5G CHIPSETS MARKET FOR RFICS, BY TYPE, 2023-2028 (USD MILLION) □103

7.3.2 □ TABLETS & LAPTOPS □103

7.3.2.1 □ Development of 5G-enabled tablets and laptops □103

TABLE 81 □ TABLETS & LAPTOPS: 5G CHIPSETS MARKET, BY TYPE, 2019-2022 (USD MILLION) □104

TABLE 82 □ TABLETS & LAPTOPS: 5G CHIPSETS MARKET, BY TYPE, 2023-2028 (USD MILLION) □104

TABLE 83 □ TABLETS & LAPTOPS: 5G CHIPSETS MARKET FOR RFICS, BY TYPE, 2019-2022 (USD MILLION) □104

TABLE 84 □ TABLETS & LAPTOPS: 5G CHIPSETS MARKET FOR RFICS, BY TYPE, 2023-2028 (USD MILLION) □104

7.3.3 □ MOBILE HUBS □105

7.3.3.1 □ Growing use of mobile hubs to provide scalable and reliable mobile communication and data processing capabilities to smart mobile objects □105

TABLE 85 □ MOBILE HUBS: 5G CHIPSETS MARKET, BY TYPE, 2019-2022 (USD MILLION) □105

TABLE 86 □ MOBILE HUBS: 5G CHIPSETS MARKET, BY TYPE, 2023-2028 (USD MILLION) □105

TABLE 87 □ MOBILE HUBS: 5G CHIPSETS MARKET FOR RFICS, BY TYPE, 2019-2022 (USD MILLION) □105

TABLE 88 □ MOBILE HUBS: 5G CHIPSETS MARKET FOR RFICS, BY TYPE, 2023-2028 (USD MILLION) □106

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

7.3.4 ROBOTS/DRONES 106

7.3.4.1 Rising adoption of autonomous robots with 5G wireless networking capabilities 106

TABLE 89 ROBOTS/DRONES: 5G CHIPSETS MARKET, BY TYPE, 2019-2022 (USD MILLION) 106

TABLE 90 ROBOTS/DRONES: 5G CHIPSETS MARKET, BY TYPE, 2023-2028 (USD MILLION) 106

FIGURE 39 RF FE SEGMENT TO ACCOUNT FOR LARGER SHARE OF 5G CHIPSETS MARKET FOR RFICS IN ROBOTS BETWEEN 2023 AND 2028 107

7.3.5 WEARABLES 107

7.3.5.1 Rising demand for wearables tethered via wireless technologies to smartphones 107

TABLE 91 WEARABLES: 5G CHIPSETS MARKET, BY TYPE, 2019-2022 (USD MILLION) 107

TABLE 92 WEARABLES: 5G CHIPSETS MARKET, BY TYPE, 2023-2028 (USD MILLION) 108

7.3.6 AR/VR DEVICES 108

7.3.6.1 5G to offer heavy bandwidth required by AR/VR devices 108

TABLE 93 AR/VR DEVICES: 5G CHIPSETS MARKET, BY TYPE, 2019-2022 (USD MILLION) 108

TABLE 94 AR/VR DEVICES: 5G CHIPSETS MARKET, BY TYPE, 2023-2028 (USD MILLION) 108

7.4 NON-MOBILE DEVICES 109

FIGURE 40 SURVEILLANCE CAMERAS SEGMENT TO LEAD 5G CHIPSETS MARKET FOR NON-MOBILE DEVICES DURING FORECAST PERIOD 109

TABLE 95 NON-MOBILE DEVICES: 5G CHIPSETS MARKET, BY TYPE, 2019-2022 (USD MILLION) 109

TABLE 96 NON-MOBILE DEVICES: 5G CHIPSETS MARKET, BY TYPE, 2023-2028 (USD MILLION) 109

TABLE 97 NON-MOBILE DEVICES: 5G CHIPSETS MARKET, BY REGION, 2019-2022 (USD MILLION) 109

TABLE 98 NON-MOBILE DEVICES: 5G CHIPSETS MARKET, BY REGION, 2023-2028 (USD MILLION) 110

7.4.1 IOT GATEWAYS 110

7.4.1.1 Enhanced capacity and coverage of 5G network 110

FIGURE 41 RFICS SEGMENT TO DOMINATE 5G CHIPSETS MARKET FOR IOT GATEWAYS BETWEEN 2023 AND 2028 111

TABLE 99 IOT GATEWAYS: 5G CHIPSETS MARKET, BY TYPE, 2019-2022 (USD MILLION) 111

TABLE 100 IOT GATEWAYS: 5G CHIPSETS MARKET, BY TYPE, 2023-2028 (USD MILLION) 111

TABLE 101 IOT GATEWAYS: 5G CHIPSETS MARKET FOR RFICS, BY TYPE, 2019-2022 (USD MILLION) 111

TABLE 102 IOT GATEWAYS: 5G CHIPSETS MARKET FOR RFICS, BY TYPE, 2023-2028 (USD MILLION) 112

7.4.2 SURVEILLANCE CAMERAS 112

7.4.2.1 Rising criminal and fraudulent activities 112

TABLE 103 SURVEILLANCE CAMERAS: 5G CHIPSETS MARKET, BY TYPE, 2019-2022 (USD MILLION) 112

TABLE 104 SURVEILLANCE CAMERAS: 5G CHIPSETS MARKET, BY TYPE, 2023-2028 (USD MILLION) 113

TABLE 105 SURVEILLANCE CAMERAS: 5G CHIPSETS MARKET FOR RFICS, BY TYPE, 2019-2022 (USD MILLION) 113

TABLE 106 SURVEILLANCE CAMERAS: 5G CHIPSETS MARKET FOR RFICS, BY TYPE, 2023-2028 (USD MILLION) 113

7.5 AUTOMOBILES 113

7.5.1 5G CHIPSETS TO WITNESS HIGH ADOPTION IN TELEMATICS 113

7.5.2 CELLULAR V2X 114

7.5.2.1 5G V2X to foster synergies between automobile and other verticals 114

FIGURE 42 ASIA PACIFIC TO EXHIBIT HIGHEST CAGR IN 5G CHIPSETS MARKET FOR AUTOMOBILES BETWEEN 2023 AND 2028 114

TABLE 107 AUTOMOBILES: 5G CHIPSETS MARKET, BY TYPE, 2019-2022 (USD MILLION) 114

TABLE 108 AUTOMOBILES: 5G CHIPSETS MARKET, BY TYPE, 2023-2028 (USD MILLION) 114

TABLE 109 AUTOMOBILES: 5G CHIPSETS MARKET FOR RFICS, BY TYPE, 2019-2022 (USD MILLION) 115

TABLE 110 AUTOMOBILES: 5G CHIPSETS MARKET FOR RFICS, BY TYPE, 2023-2028 (USD MILLION) 115

TABLE 111 AUTOMOBILES: 5G CHIPSETS MARKET, BY REGION, 2019-2022 (USD MILLION) 115

TABLE 112 AUTOMOBILES: 5G CHIPSETS MARKET, BY REGION, 2023-2028 (USD MILLION) 115

8 5G CHIPSETS MARKET, BY FREQUENCY 116

8.1 INTRODUCTION 117

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

FIGURE 43 24-39 GHZ SEGMENT TO REGISTER HIGHEST CAGR IN 5G CHIPSETS MARKET FROM 2023 TO 2028 117

TABLE 113 5G CHIPSETS MARKET, BY FREQUENCY, 2019-2022 (USD MILLION) 117

TABLE 114 5G CHIPSETS MARKET, BY FREQUENCY, 2023-2028 (USD MILLION) 117

8.2 SUB-6 GHZ 118

8.2.1 HIGH DEMAND FOR SUB-6 GHZ 5G CHIPSETS FROM QUALCOMM, MEDIATEK, AND SAMSUNG 118

8.3 24-39 GHZ 118

8.3.1 GROWING NEED TO ADDRESS MOBILE DATA TRAFFIC ISSUE 118

8.4 ABOVE 39 GHZ 119

8.4.1 INCREASING ADOPTION OF ABOVE 39 GHZ SPECTRUM FOR FIXED POINT-TO-POINT AND POINT-TO-MULTIPOINT SATELLITE OPERATIONS 119

9 5G CHIPSETS MARKET, BY PROCESS NODE 120

9.1 INTRODUCTION 121

FIGURE 44 10-28 NM SEGMENT TO RECORD HIGHEST CAGR IN 5G CHIPSETS MARKET DURING FORECAST PERIOD 121

TABLE 115 5G CHIPSETS MARKET, BY PROCESS NODE, 2019-2022 (USD MILLION) 121

TABLE 116 5G CHIPSETS MARKET, BY PROCESS NODE, 2023-2028 (USD MILLION) 121

9.2 LESS THAN 10 NM 122

9.2.1 RISING DEPLOYMENT OF 5-7 NM 5G CHIPSETS IN SMARTPHONES 122

9.3 10-28 NM 122

9.3.1 HIGH ADOPTION OF PROCESS NODES RANGING FROM 10-28 NM IN MOBILE DEVICES 122

9.4 ABOVE 28 NM 122

9.4.1 INCREASING APPLICATIONS OF RF COMPONENTS WITH PROCESS NODES ABOVE 28 NM IN 5G INFRASTRUCTURE 122

10 5G CHIPSETS MARKET, BY REGION 123

10.1 INTRODUCTION 124

FIGURE 45 SOUTH AMERICA AND MEXICO TO BE NEW HOTSPOTS FOR 5G CHIPSETS MARKET DURING FORECAST PERIOD 124

TABLE 117 5G CHIPSETS MARKET, BY REGION, 2019-2022 (USD MILLION) 124

TABLE 118 5G CHIPSETS MARKET, BY REGION, 2023-2028 (USD MILLION) 125

10.2 NORTH AMERICA 125

FIGURE 46 NORTH AMERICA: 5G CHIPSETS MARKET SNAPSHOT 126

10.2.1 NORTH AMERICA: RECESSION IMPACT 126

TABLE 119 NORTH AMERICA: 5G CHIPSETS MARKET, BY END USE, 2019-2022 (USD MILLION) 127

TABLE 120 NORTH AMERICA: 5G CHIPSETS MARKET, BY END USE, 2023-2028 (USD MILLION) 127

TABLE 121 NORTH AMERICA: 5G CHIPSETS MARKET, BY COUNTRY, 2019-2022 (USD MILLION) 127

TABLE 122 NORTH AMERICA: 5G CHIPSETS MARKET, BY COUNTRY, 2023-2028 (USD MILLION) 127

10.2.2 US 128

10.2.2.1 Collaboration of Department of Defense (DoD) with industry players and academia under 5G-to-Next G initiative 128

10.2.3 CANADA 128

10.2.3.1 Rising investments in clean energy, drive-less vehicle, and smart city projects 128

10.2.4 MEXICO 128

10.2.4.1 Deployment of 5G network by companies on trial basis 128

10.3 EUROPE 129

FIGURE 47 EUROPE: 5G CHIPSETS MARKET SNAPSHOT 130

10.3.1 EUROPE: RECESSION IMPACT 130

TABLE 123 5G ACTIVITIES IN EUROPE 131

TABLE 124 EUROPE: 5G CHIPSETS MARKET, BY END USE, 2019-2022 (USD MILLION) 132

TABLE 125 EUROPE: 5G CHIPSETS MARKET, BY END USE, 2023-2028 (USD MILLION) 132

TABLE 126 EUROPE: 5G CHIPSETS MARKET, BY COUNTRY, 2019-2022 (USD MILLION) 133

TABLE 127 EUROPE: 5G CHIPSETS MARKET, BY COUNTRY, 2023-2028 (USD MILLION) 133

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

10.3.2	UK	133
10.3.2.1	UK to dominate 5G chipsets market in Europe with increasing PPP activities	133
10.3.3	GERMANY	134
10.3.3.1	Developments by Vodafone and T-Mobile companies in 5G	134
10.3.4	FRANCE	134
10.3.4.1	Deployment of connected car technologies by renowned car manufacturers	134
10.3.5	REST OF EUROPE	135
10.4	ASIA PACIFIC	135
FIGURE 48	ASIA PACIFIC: 5G CHIPSETS MARKET SNAPSHOT	136
10.4.1	ASIA PACIFIC: RECESSION IMPACT	136
TABLE 128	ASIA PACIFIC: 5G CHIPSETS MARKET, BY END USE, 2019-2022 (USD MILLION)	137
TABLE 129	ASIA PACIFIC: 5G CHIPSETS MARKET, BY END USE, 2023-2028 (USD MILLION)	137
TABLE 130	ASIA PACIFIC: 5G CHIPSETS MARKET, BY COUNTRY, 2019-2022 (USD MILLION)	137
TABLE 131	ASIA PACIFIC: 5G CHIPSETS MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	137
10.4.2	CHINA	138
10.4.2.1	Expanding 5G chipsets market	138
10.4.3	JAPAN	138
10.4.3.1	Rising development and deployment of 5G infrastructure	138
10.4.4	SOUTH KOREA	138
10.4.4.1	Increasing collaborations between government and private companies to launch 5G mobile networks	138
10.4.5	REST OF ASIA PACIFIC	139
10.5	ROW	139
FIGURE 49	ROW: 5G CHIPSETS MARKET SNAPSHOT	140
10.5.1	ROW: RECESSION IMPACT	140
TABLE 132	ROW: 5G CHIPSETS MARKET, BY END USE, 2019-2022 (USD MILLION)	141
TABLE 133	ROW: 5G CHIPSETS MARKET, BY END USE, 2023-2028 (USD MILLION)	141
TABLE 134	ROW: 5G CHIPSETS MARKET, BY COUNTRY, 2019-2022 (USD MILLION)	141
TABLE 135	ROW: 5G CHIPSETS MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	141
10.5.2	MIDDLE EAST & AFRICA	142
10.5.2.1	Increasing demand for 5G in UAE, Saudi Arabia, and Qatar	142
10.5.3	SOUTH AMERICA	142
10.5.3.1	Rising demand for smartphones and mobile networks in Brazil, Mexico, Chile, and Argentina	142
11	COMPETITIVE LANDSCAPE	144
11.1	OVERVIEW	144
11.2	REVENUE ANALYSIS	144
FIGURE 50	THREE-YEAR REVENUE ANALYSIS OF TOP FIVE PLAYERS IN 5G CHIPSETS MARKET	144
11.3	MARKET SHARE ANALYSIS	145
FIGURE 51	5G CHIPSETS MARKET SHARE, 2022	145
TABLE 136	5G CHIPSETS MARKET: DEGREE OF COMPETITION	145
11.4	COMPANY EVALUATION QUADRANT, 2022	147
11.4.1	STARS	147
11.4.2	EMERGING LEADERS	147
11.4.3	PERVASIVE PLAYERS	147
11.4.4	PARTICIPANTS	147
FIGURE 52	GLOBAL 5G CHIPSETS MARKET: KEY COMPANY EVALUATION QUADRANT, 2022	148
11.5	SMALL AND MEDIUM-SIZED ENTERPRISES (SMES) EVALUATION QUADRANT, 2022	148
11.5.1	PROGRESSIVE COMPANIES	148

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

11.5.2	RESPONSIVE COMPANIES	148
11.5.3	DYNAMIC COMPANIES	149
11.5.4	STARTING BLOCKS	149
FIGURE 53	GLOBAL 5G CHIPSETS MARKET: SME EVALUATION QUADRANT, 2022	149
TABLE 137	5G CHIPSETS MARKET: COMPANY FOOTPRINT	150
TABLE 138	5G CHIPSETS MARKET: TYPE FOOTPRINT	151
TABLE 139	5G CHIPSETS MARKET: APPLICATION FOOTPRINT	152
TABLE 140	5G CHIPSETS MARKET: REGIONAL FOOTPRINT	153
11.6	COMPETITIVE SCENARIOS AND TRENDS	154
11.6.1	PRODUCT LAUNCHES	154
TABLE 141	5G CHIPSETS MARKET: PRODUCT LAUNCHES, FEBRUARY 2019-DECEMBER 2022	154
11.6.2	DEALS	160
TABLE 142	5G CHIPSETS MARKET: DEALS, FEBRUARY 2019-DECEMBER 2022	160
11.6.3	OTHERS	164
TABLE 143	5G CHIPSETS MARKET: OTHERS, FEBRUARY 2020-OCTOBER 2022	164
12	COMPANY PROFILES	165
12.1	KEY PLAYERS	165
(Business overview, Products offered, Recent developments, Product launches, Deals, MnM view, Key strengths/Right to win, Strategic choices made, and Weaknesses/competitive threats)*		
12.1.1	QUALCOMM TECHNOLOGIES, INC.	165
TABLE 144	QUALCOMM TECHNOLOGIES, INC.: COMPANY OVERVIEW	165
FIGURE 54	QUALCOMM TECHNOLOGIES, INC.: COMPANY SNAPSHOT	166
12.1.2	SAMSUNG	171
TABLE 145	SAMSUNG: COMPANY OVERVIEW	171
FIGURE 55	SAMSUNG: COMPANY SNAPSHOT	172
12.1.3	MEDIATEK INC.	175
TABLE 146	MEDIATEK INC.: COMPANY OVERVIEW	175
FIGURE 56	MEDIATEK INC.: COMPANY SNAPSHOT	175
12.1.4	HUAWEI TECHNOLOGIES CO., LTD.	180
TABLE 147	HUAWEI TECHNOLOGIES CO., LTD.: COMPANY OVERVIEW	180
FIGURE 57	HUAWEI TECHNOLOGIES CO., LTD.: COMPANY SNAPSHOT	181
12.1.5	BROADCOM	184
TABLE 148	BROADCOM: COMPANY OVERVIEW	184
FIGURE 58	BROADCOM: COMPANY SNAPSHOT	185
12.1.6	QORVO	187
TABLE 149	QORVO: COMPANY OVERVIEW	187
FIGURE 59	QORVO: COMPANY SNAPSHOT	188
12.1.7	SKYWORKS SOLUTIONS, INC.	192
TABLE 150	SKYWORKS SOLUTIONS, INC.: COMPANY OVERVIEW	192
FIGURE 60	SKYWORKS: COMPANY SNAPSHOT	193
12.1.8	ANALOG DEVICES	198
TABLE 151	ANALOG DEVICES: COMPANY OVERVIEW	198
FIGURE 61	ANALOG DEVICES: COMPANY SNAPSHOT	199
12.1.9	MARVELL	201
TABLE 152	MARVELL: COMPANY OVERVIEW	201
FIGURE 62	MARVELL: COMPANY SNAPSHOT	202
12.1.10	ANOKIWAVE INC.	205

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 153 ANOKIWAVE INC.: COMPANY OVERVIEW 205

12.1.11 NXP SEMICONDUCTOR 208

TABLE 154 NXP SEMICONDUCTOR: COMPANY OVERVIEW 208

FIGURE 63 NXP SEMICONDUCTOR: COMPANY SNAPSHOT 209

12.2 OTHER PLAYERS 212

12.2.1 XILINX 212

12.2.2 TEXAS INSTRUMENTS INCORPORATED 213

12.2.3 MURATA MANUFACTURING CO., LTD. 214

12.2.4 RENESAS ELECTRONICS CORPORATION 215

12.2.5 INFINEON TECHNOLOGIES AG 216

12.2.6 MACOM 217

12.2.7 U-BLOX 218

12.2.8 SIVERS IMA 219

12.2.9 UNISOC (SHANGHAI) TECHNOLOGIES CO., LTD. 220

12.2.10 ARM LIMITED 221

12.2.11 CADENCE DESIGN SYSTEMS, INC. 222

12.2.12 FIBOCOM WIRELESS INC. 223

12.2.13 QUECTEL 224

12.2.14 OMMIC 225

*Details on Business overview, Products offered, Recent developments, Product launches, Deals, MnM view, Key strengths/Right to win, Strategic choices made, and Weaknesses/competitive threats might not be captured in case of unlisted companies.

13 APPENDIX 226

13.1 DISCUSSION GUIDE 226

13.2 KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL 230

13.3 RELATED REPORTS 232

13.4 AUTHOR DETAILS 233

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5G Chipsets Market by Type (Modems, RFICs), Frequency (Sub - 6 GHz, 24 - 29 GHz, Above 39 GHz), Process Node (Less than 10 nm, 10 to 28 nm, Above 28 nm), End-use (Telecommunication Infrastructure, Mobile Devices) and Region - Global Forecast to 2028

Market Report | 2023-03-08 | 227 pages | MarketsandMarkets

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Zip Code*

Country*

Date

2026-03-10

Signature

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com