

THE GAAS IC MARKETS

Table of Contents

Chapter 1	Introduction	1-1
Chapter 2	Executive Summary	2-1
2.1	Summary of Major Issues	2-1
2.2	Summary of Market Forecast	2-3
Chapter 3	Technology Issues	3-1
3.1	GaAs Devices	3-1
3.1.1	FETs	3-1
3.1.2	HEMTs	3-3
3.1.3	HBT	3-6
3.2	Comparison of Logic Structures	3-10
3.2.1	Buffered FET Logic	3-12
3.2.2	FET Logic	3-12
3.2.3	Capacitively Enhanced Logic	3-15
3.2.4	Direct-Coupled FET Logic	3-15
3.2.5	Source-Coupled FET Logic	3-17
3.3	Material Issues	3-20
3.3.1	Wafer Production	3-20
3.3.2	Etch Pit Densities	3-25
3.4	Equipment	3-29
3.4.1	Implanters	3-42
3.4.2	Lithography	3-43
3.4.3	Etching	3-44
3.4.4	Deposition	3-46
3.4.5	Rapid Thermal Processing	3-47
3.5	Packaging	3-47
3.5.1	Package Types	3-49

3.5.2	Bonding	3-51
3.6	Testing	3-55
3.7	Design	3-56
Chapter 4	Applications for GaAs ICs	4-1
4.1	Introduction	4-1
4.1.1	The Trend Toward Higher Frequencies	4-3
4.1.2	Transition from Analog to Digital Modulation	4-3
4.1.3	Discrete Components and Silicon-Based ICs	4-4
4.2	Markets	4-7
4.2.1	Telecommunications Systems	4-7
4.2.2	Television Systems	4-13
4.2.3	Computing	4-14
4.2.4	Data Communications	4-15
4.2.5	Automotive	4-20
4.2.6	Automated Test Equipment	4-22
4.2.7	Military	4-23
Chapter 5	IC Supplier and End-User Issues	5-1
5.1	Introduction	5-1
5.2	Competing Against Silicon	5-3
5.3	Competing Against The Japanese	5-11
5.4	Taiwan's Market Momentum	5-11
5.5	Korea's Market Momentum	5-13
5.6	Wafer Sizes	5-19
5.7	Competing Against SiGe	5-22
5.7.1	Introduction	5-22
5.7.2	Technology	5-25
5.7.2.1	Strained Silicon	5-26
5.7.2.2	Device Manufacturing	5-36
5.7.3	Applications	5-38
5.7.3.1	Wireless LAN	5-38

5.7.3.2	WiMAX	5-38
5.7.3.3	Bluetooth	5-39
5.7.3.4	Cellular	5-39
5.7.3.5	GPS	5-52
Chapter 6	Market Forecast	6-1
6.1	Driving Forces	6-1
6.2	Market Forecast Assumptions	6-5
6.3	GaAs IC Market Forecast	6-7
6.4	SiGe IC Market Forecast	6-22
6.5	End Application Market	6-25
Chapter 7	Profile of GaAs IC Manufacturers	7-1
List of Tables		
5.1	Cost Comparison for GaAs Structures	5-8
5.2	A Comparison of SiGe BiCMOS, RF CMOS, and InGaP/GaAs	5-37
6.1	Worldwide Merchant GaAs IC Market Forecast By Device Type	6-8
6.2	Worldwide Merchant Market Forecast By Geographical Region	6-11
6.3	Worldwide Merchant Market Forecast By Application	6-13
6.4	Market Shares of Merchant Participants - 2013	6-21
List of Figures		
3.1	Schematic of GaAs MESFET	3-2
3.2	Schematic of GaAs HEMT Device	3-4
3.3	Schematic of GaAs HBT Device	3-8
3.4	Schematic of GaAs HBT Device	3-9
3.5	Symbolic Representations of Various GaAs Transistor Type	3-11
3.6	Schematic of BFL Logic Gate	3-13
3.7	Schematic of FETL Logic Gate	3-14
3.8	Schematic of CEL Logic Gate	3-16

3.9	Schematic of DCFL Logic Gate	3-18
3.10	Schematic of SCFL Logic Gate	3-19
3.11	Full wafer EPD mapping of LEC and VGF wafers	3-27
3.12	Mesoscopic EL2 mapping of LEC and VGF wafers	3-28
3.13	pHEMT MMIC Process Flow Chart	3-31
3.14	0.15 Micron 3MI Process Cross Section	3-37
3.15	InGaP HBT Process	3-40
5.1	Comparison of Die Costs of Si and GaAs	5-6
5.2	Strained Silicon Germanium Technology	5-28
5.3	Fourth Generation Of Strain Technology	5-32
5.4	Performance Versus Germanium Content	5-33
5.5	Bulk Versus SOI Strain Method	5-34
6.1	Worldwide Merchant GaAs IC Market Forecast	6-9
6.2	Worldwide GaAs Merchant Market Forecast By Geographical Region	6-12
6.3	Worldwide GaAs Merchant Market Forecast By Application	6-14
6.4	Global Handset Market	6-16
6.5	Migration Of PA's In Handset Market	6-18
6.6	CMOS Replacement Of Bipolar And GaAs	6-19
6.7	Worldwide SiGe Market Forecast	6-23