

# The Databeans Monthly

March 2, 2010

## Texas Instruments remains on top of the leader board in general purpose and high performance analog market

*“When you reach the top, that’s when the climb begins.”*

– Michael Caine, English Actor (1933-present)

The general purpose analog market, which also includes high performance products such as precision data converters, and sophisticated power management ICs with integrated battery chargers and multiple PWM outputs, fell to just under \$13 billion worldwide in 2009. This was a 15 percent decline from 2008. The ranking of the top five suppliers remained unchanged from 2008 to 2009; however, four of the five players did lose some market share - all but Texas Instruments, which gained share from 18 percent in 2008 to close to 19 percent in 2009.

Databeans estimates that Texas Instruments gained share in all four segments for general purpose analog which are amplifiers, interface, power, and data converters. Texas Instruments is the leading supplier in the amplifier, interface, and power markets, while Analog Devices continues to dominate the data converter market.

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### 2009 and 2008 Worldwide General Purpose Analog Revenue by Supplier

| Company                       | 2009 Rank | 2009 \$M      | 2009 Share | 2008 Rank | 2008 \$M      | 2008 Share | Y/Y %       |
|-------------------------------|-----------|---------------|------------|-----------|---------------|------------|-------------|
| Texas Instruments             | 1         | 2,436         | 18.8%      | 1         | 2,751         | 17.9%      | -11%        |
| Analog Devices                | 2         | 1,690         | 13.0%      | 2         | 2,048         | 13.3%      | -17%        |
| National Semiconductor        | 3         | 1,098         | 8.4%       | 3         | 1,510         | 9.8%       | -27%        |
| Maxim Integrated Products     | 4         | 1,037         | 8.0%       | 4         | 1,232         | 8.0%       | -16%        |
| Linear Technology             | 5         | 894           | 6.9%       | 5         | 1,148         | 7.5%       | -22%        |
| STMicroelectronics            | 6         | 497           | 3.8%       | 6         | 588           | 3.8%       | -15%        |
| ON Semiconductor              | 7         | 368           | 2.8%       | 8         | 398           | 2.6%       | -7%         |
| Intersil                      | 8         | 329           | 2.5%       | 7         | 398           | 2.6%       | -17%        |
| Fairchild Semiconductor Int'l | 9         | 277           | 2.1%       | 9         | 366           | 2.4%       | -24%        |
| Richtek                       | 10        | 246           | 1.9%       | 13        | 215           | 1.4%       | 14%         |
| Other                         |           | 4,116         | 31.7%      |           | 4,691         | 30.6%      | -12%        |
| <b>Total</b>                  |           | <b>12,989</b> |            |           | <b>15,343</b> |            | <b>-15%</b> |

databeans estimates



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ON Semiconductor also performed better than the pack in general purpose analog, with an increase in share, moving the company from a ranking of 8th to 7th. And Richtek, a power management company in Taiwan, moved into the top 10 listing, as it was one of the only companies in the top 15 that actually grew in 2009. The other company that grew was also a power management company: Power Integrations.

General purpose analog revenue is expected to bounce back this year as inventory levels normalize and demand increases in the computer, consumer, and communications application markets. Databeans is predicting that 2010 worldwide general purpose analog revenue will reach over \$15 billion - a hefty \$2 billion more than last year.



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