

# 2009 Industrial Analog ICs

---

Analog Markets – Worldwide



# 2009 Industrial Analog ICs

---

Analog Markets – Worldwide

Susie Inouye

Myson Robles-Bruce

Matt Scherer

Publication Number: 09ANALOG-Industrial

May 2009

© 2009 **databeans** Incorporated

Reno, NV 89523

Phone: 775.624.6200

[www.databeans.net](http://www.databeans.net)

---

## Abstract

Databeans divides industrial analog into four distinct categories: medical, test and measurement, industrial controls, and mil/aero categories, with mil/aero and process control being the most profitable groups projected for 2009.

The general trend in industrial manufacturing in recent years has migrated towards increased connectivity, including Wi-Fi and other formats, reduced costs, and better power efficiency, which includes the push towards “green energy”. Increased analog content is helping firms achieve these ends. Databeans predicts that analog revenue will reach \$3.9 billion in 2009 and grow at a compound annual growth rate of 8 percent over the forecasted period until it reaches \$5.7 billion by 2014.

This study is available through individual report purchase for **\$2,300.00 USD**, or available at a discounted rate through our **Databeans Complete Library**, the **Analog Markets Service**, and the **Analog Applications Service**, which includes this study as well as other in-depth reports on Amplifiers and Comparators, Data Converters, Interface, Analog Power Management, and application specific devices. For our subscription service subscribers, all of our research is backed by a coverage guarantee meaning if you purchase a report and need additional information, our analysts are available to continue the analysis, customized to your organization’s needs.

## ABOUT DATABEANS

---

Databeans, Inc., headquartered in Reno, Nevada, USA, is an internationally recognized market research firm focused on the semiconductor and electronics industry. Databeans publishes over 50 market research reports annually that are available for purchase as individual studies, or bundled together in cost-saving subscription services. Databeans' detailed quality studies, industry leading customer service, and unparalleled responsiveness are unmatched in the electronics market research industry.

## BENEFITS OF A SUBSCRIPTION SERVICE WITH DATABEANS:

---

### **Databeans will become an extension of your group**

For our subscription services clients, and customers that have purchased 5 or more reports in a calendar year, Databeans will help with presentations, fact-finding inquiries, and essentially any project that internal groups may not have the time or resources to accomplish.

### **Inquiry hours**

All our subscription services, and customers that have purchased 5 or more individual reports in a calendar year, includes inquiry hours, allowing clients to take full advantage of our analysts for contribution to internal marketing and business planning.

### **Corporate-wide site licensing**

We encourage our clients to post our reports on their internal website, at no additional cost. This allows for maximum visibility and value of Databeans data and reports within your company.

### **Work within your budget**

We can create any type of payment plan that you desire. Call us to see which options will work best for your group or company.

### **Ease of doing business**

By ordering once a year, your company will automatically receive the reports or services ordered when they first become available.

### **Additional Savings**

- Our minimum discount with our smaller services is about 20% off list price, while our full service customers save about 40% off list price.
- The Databeans Complete Library includes our Semiconductor Application Demand Model and Market Share Database, free.
- Enjoy any Databeans service and your company qualifies for a 20% discount on any non-subscription report Databeans publishes.

For more information, please contact us at 775.624.6200 or visit our website at [www.databeans.net](http://www.databeans.net).

---

# Table of Contents

Significant Findings .....	1
Industrial Analog Market Overview .....	1
Medical.....	3
Test and Measurement.....	4
Industrial Controls.....	5
Military and Aerospace.....	6
Regional Demand Analysis.....	7
Americas .....	9
Europe .....	10
Japan.....	12
Asia Pacific.....	13
Application Consumption Analysis .....	15
Medical.....	17
Test and Measurement.....	22
Power Analyzers.....	23
ATE.....	24
Telecom Test .....	24
Industrial Controls.....	26
Military and Aerospace.....	30
Supplier Market Share .....	35
Infineon Technologies .....	39
STMicroelectronics .....	40
Texas Instruments .....	41
ON Semiconductor .....	42
Atmel.....	43
Zarlink.....	43
Intersil.....	44
Methodology.....	45
Databeans Market and Product Segmentation Definitions .....	47
Market Segmentation.....	47
Product Segmentation .....	54

---

---

# Table of Figures

Figure 1: Worldwide Analog Revenue Forecast by Industrial Application Market .....	2
Figure 2: Worldwide Industrial Analog ASSP Market Forecast (Revenue, Units, and ASPs).....	2
Figure 3: Worldwide Industrial Analog ASSP Revenue Forecast by Region .....	7
Figure 4: 2009 and 2014 Worldwide Industrial Analog ASSP Revenue Share by Region .....	8
Figure 5: Americas Industrial Analog ASSP Revenue Forecast .....	10
Figure 6: Europe Industrial Analog ASSP Revenue Forecast .....	11
Figure 7: Japan Industrial Analog ASSP Revenue Forecast.....	12
Figure 8: Asia Pacific Industrial Analog ASSP Revenue Forecast.....	14
Figure 9: Worldwide Industrial Analog ASSP Revenue Forecast by Application Market .....	15
Figure 10: 2009 and 2014 Worldwide Industrial Analog ASSP Revenue Share by Industrial Application Market .....	16
Figure 11: Worldwide Industrial Analog ASSP Revenue Forecast in Medical Application.....	18
Figure 12: 2009 Worldwide Industrial Analog ASSP Revenue Share by Medical Application .....	19
Figure 13: Worldwide Industrial Analog ASSP Revenue Forecast in Test Application.....	23
Figure 14: 2009 Worldwide Industrial Analog ASSP Revenue Share by Test Application .....	23
Figure 15: Worldwide Industrial Analog ASSP Revenue Forecast in Control Application.....	27
Figure 16: 2009 Worldwide Industrial Analog ASSP Revenue Share by Control Application .....	28
Figure 17: Worldwide Industrial Analog ASSP Revenue Forecast in Mil/Aero Application .....	31
Figure 18: 2009 Worldwide Industrial Analog ASSP Revenue Share by Mil/Aero Application .....	31
Figure 19: 2008 Worldwide Industrial Analog ASSP Revenue Share by Supplier .....	35

---

---

# Table of Tables

Table 1: Worldwide Analog Revenue Forecast by Industrial Application Market.....	1
Table 2: Worldwide Industrial Analog ASSP Market Forecast (Revenue, Units, and ASPs).....	2
Table 3: Worldwide Industrial Analog ASSP Revenue Forecast by Region .....	8
Table 4: Worldwide Industrial Analog ASSP Shipment Forecast by Region.....	9
Table 5: Worldwide Industrial Analog ASSP Revenue Forecast by Application Market.....	17
Table 6: Worldwide Industrial Analog ASSP Revenue Forecast by Medical Application .....	19
Table 7: Worldwide Medical Electronics Revenue Forecast by Application .....	20
Table 8: Worldwide Medical Electronics Shipment Forecast by Application.....	21
Table 9: Worldwide Industrial Analog ASSP Revenue Forecast by Test Application .....	22
Table 10: Worldwide Test and Measurement Electronics Revenue Forecast by Application .....	25
Table 11: Worldwide Test and Measurement Electronics Shipment Forecast by Application.....	26
Table 12: Worldwide Industrial Analog ASSP Revenue Forecast by Control Application .....	28
Table 13: Worldwide Industrial Control Electronics Revenue Forecast by Application.....	29
Table 14: Worldwide Industrial Control Electronics Shipment Forecast by Application .....	29
Table 15: Worldwide Industrial Analog ASSP Revenue Forecast by Mil/Aero Application.....	32
Table 16: Worldwide Military and Aerospace Electronics Revenue Forecast by Application .....	32
Table 17: Worldwide Military and Aerospace Electronics Shipment Forecast by Application .....	33
Table 18: 2008 and 2007 Worldwide Industrial Analog ASSP Revenue by Supplier .....	36
Table 19: 2008 and 2007 Americas Market Industrial Analog ASSP Revenue by Supplier.....	37
Table 20: 2008 and 2007 Europe Market Industrial Analog ASSP Revenue by Supplier.....	37
Table 21: 2008 and 2007 Japan Market Industrial Analog ASSP Revenue by Supplier .....	38
Table 22: 2008 and 2007 Asia Pacific Market Industrial Analog ASSP Revenue by Supplier.....	38

---

---

*This report is the property of Databeans Inc., and has been distributed to a select group of clients upon specified terms and conditions. Data presented in this report is an interpretation of the modeled market, and is believed to be reliable, but is not guaranteed for accuracy or completeness. Reproduction of this report, in whole or in parts, is permitted only by express consent of Databeans, Inc.*



© 2009 **databeans** Incorporated  
Publication Number: 09ANALOG-Industrial  
Research Analyst: Susie Inouye  
✉ [sinouye@databeans.net](mailto:sinouye@databeans.net)  
Research Analyst: Matt Scherer  
✉ [matt@databeans.net](mailto:matt@databeans.net)  
Research Analyst: Myson Robles-Bruce  
✉ [myson@databeans.net](mailto:myson@databeans.net)

---