2010 Analog ICs

Analog Markets Service

databeans®

ENGINEERED FOR GROWTH

2010 Analog ICs

Analog Markets Service

Susie Inouye
Myson Robles-Bruce
Matt Scherer

Publication Number: 10ANALOG-Analog
April 2010

© 2010 databeans Incorporated

Reno, NV 89523
Phone: 775.624.6200
www.databeans.net

Abstract

For the near future, expect analog products revenue to be higher in all of the major markets, and in communications and consumer segments especially, driven by the increased demand from portable electronics and handsets, and by increasing consumption by the Asia Pacific region.

The analog components are attractive from a purely business point of view, considering that the potential range of customers is so broad, and yet the products for the most part are not considered commodities. They have longer product lives than digital components, and pricing has tended to be far more stable over time.

Analog IC suppliers have enjoyed better than expected results for the year so far, being able to profit from the strengthening demand for analog products, including power management ICs, signal processing components, and interface. Databeans estimates that for this year, analog components will constitute a market valued at $36.2 billion.

Analog products fall into two major categories, general purpose analog and application specific analog. Application specific product revenue is larger than the general purpose market, but the general purpose market is growing faster. This year, Databeans is expecting both markets to grow due to increased demand and inventory rebuilding. General purpose will likely complete the year at $15.1 billion in worldwide revenue, with application specific products rising to a level of about $21 billion.

This study is available through individual report purchase for **$3,700.00 USD,** or available at a discounted rate through our **Total Technology Service**, the **Semiconductor Markets Service**, our **Semiconductor Products Service**, the **Analog Markets Service**, our **General Purpose Analog Service**, and the **Analog Applications Service.** 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 unparallel 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, 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 include 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 25% off list price, while our full service customers save about 48% off list price.
- The Total Technology Service includes our Databeans Market Database and 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.

©2010 databeans Incorporated Please do not duplicate without permission.

Table of Contents

Significant Findings 1
- Analog Market 1
- Analog Product Segmentation 3

Regional Markets 5
- Americas 7
- Europe 10
- Japan 13
- Asia Pacific 16

Consumption Analysis 21
- Automotive 22
- Computer 28
- Consumer 34
- Communications 40
- Industrial 46

Production Analysis 51
- High Performance Analog 51
- Standard Performance Analog 54
- Standard Analog 56
  - Amplifiers 58
    - Operational Amplifiers: 60
    - Instrumentation Amplifiers: 60
  - Comparators 60
  - Data Converters 63
  - Interface 65
  - Power Management 67
- Special Purpose Analog 70
  - Automotive Specific 72
  - Computer Specific 74
  - Consumer Specific 75
  - Communications Specific 77
  - Industrial Specific 79

Analog Suppliers 81
- Texas Instruments 94
- STMicroelectronics 95
- Infineon Technologies 96
- Analog Devices 97
- NXP Semiconductors 98
- Maxim Integrated Products 99
- National Semiconductor 100
- Linear Technology 101

Methodology 103

Databeans Market and Product Segmentation Definitions 105
- Market Segmentation 105
- Product Segmentation 112

Table of Figures

Figure 1: Worldwide Analog Market Forecast (Revenue, Units, and ASP) 3
Figure 2: Worldwide General Purpose Analog Market Forecast (Revenue, Units, and ASP) 4
Figure 3: Worldwide Application Specific Analog Market Forecast (Revenue, Units, and ASP) 4
Figure 4: Worldwide Analog Revenue Forecast by Region 5
Figure 5: 2010 and 2015 Worldwide Analog Revenue Share by Region 6
Figure 6: Americas Analog Revenue Forecast 8
Figure 7: Americas Analog Market Forecast (Revenue, Units, and ASP) 9
Figure 8: 2010 Americas Analog Revenue Share by Product 9
Figure 9: Europe Analog Revenue Forecast 11
Figure 10: Europe Analog Market Forecast (Revenue, Units, and ASP) 11
Figure 11: 2010 Europe Analog Revenue Share by Product 13
Figure 12: Japan Analog Revenue Forecast 14
Figure 13: Japan Analog Market Forecast (Revenue, Units, and ASP) 15
Figure 14: 2010 Japan Analog Revenue Share by Product 16
Figure 15: Asia Pacific Analog Revenue Forecast 18
Figure 16: Asia Pacific Analog Market Forecast (Revenue, Units, and ASP) 18
Figure 17: 2010 Asia Pacific Analog Revenue Share by Product 19
Figure 18: Worldwide Analog IC Revenue Forecast by Market Segment 21
Figure 19: Worldwide Automotive Analog IC Revenue Forecast 22
Figure 20: 2010 Worldwide Automotive Analog Revenue Share by Product Type 24
Figure 21: 2010 Worldwide Automotive Analog Revenue Share by Application 25
Figure 22: Worldwide Computer Analog IC Revenue Forecast 28
Figure 23: 2010 Worldwide Computer Analog Revenue Share by Product Type 30
Figure 24: 2010 Worldwide Computer Analog Revenue Share by Application 31
Figure 25: Worldwide Consumer Analog IC Revenue Forecast 34
Figure 26: 2010 Worldwide Consumer Analog Revenue Share by Product Type 36
Figure 27: 2010 Worldwide Consumer Analog Revenue Share by Application 37
Figure 28: Worldwide Communications Analog IC Revenue Forecast 40
Figure 29: 2010 Worldwide Communications Analog Revenue Share by Product Type 42
Figure 30: 2010 Worldwide Communications Analog Revenue Share by Application 43
Figure 31: Worldwide Industrial Analog IC Revenue Forecast 46

Figure 32: 2010 Worldwide Industrial Analog Revenue Share by Product 48
Figure 33: Worldwide Industrial Analog Revenue Forecast by Application Area 48
Figure 34: Worldwide High Performance Analog Revenue Forecast by Product 52
Figure 35: 2010 and 2015 Worldwide High Performance Analog Revenue Share by Product..... 53
Figure 36: Worldwide Standard Performance Analog Revenue Forecast by Product..... 54
Figure 37: 2010 Worldwide Standard Performance Analog Revenue Share by Product 55
Figure 38: 2010 and 2015 Worldwide Standard Analog Revenue Share by Product..... 57
Figure 39: Worldwide Standard Analog Revenue Forecast by Product..... 58
Figure 40: Worldwide Amplifier Market Forecast (Revenue, Units, and ASP) 59
Figure 41: Worldwide Comparator Market Forecast (Revenue, Units, and ASP)..... 61
Figure 42: Worldwide Amplifier and Comparator (Signal Conditioning) Market Forecast (Revenue, Units, and ASP) 62
Figure 43: Worldwide Data Converter Market Forecast (Revenue, Units, and ASP)..... 64
Figure 44: Worldwide Interface Market Forecast (Revenue, Units, and ASP) 66
Figure 45: Worldwide Power Management Market Forecast (Revenue, Units, and ASP)..... 69
Figure 46: Worldwide Special Purpose Analog Revenue Forecast by Product 70
Figure 47: 2010 Worldwide Special Purpose Analog Revenue Share by Product..... 71
Figure 48: Worldwide Automotive Specific Market Forecast (Revenue, Units, and ASP)..... 73
Figure 49: Worldwide Computer Specific Market Forecast (Revenue, Units, and ASP) 75
Figure 50: Worldwide Consumer Specific Market Forecast (Revenue, Units, and ASP)..... 76
Figure 51: Worldwide Communications Specific Market Forecast (Revenue, Units, and ASP)..... 78
Figure 52: Worldwide Industrial Specific Market Forecast (Revenue, Units, and ASP) 80
Figure 53: 2009 Worldwide Analog Revenue Share by Supplier..... 81

Table of Tables

Table 1: Worldwide Analog Market Forecast (Revenue, Units, and ASP) 2
Table 2: Worldwide General Purpose Analog Market Forecast (Revenue, Units, and ASP) 3
Table 3: Worldwide Application Specific Analog Market Forecast (Revenue, Units, and ASP) 4
Table 4: Worldwide Analog Revenue Forecast by Region 7
Table 5: Worldwide Analog Shipment Forecast by Region 7
Table 6: Americas Analog Market Forecast (Revenue, Units, and ASP) 9
Table 7: Americas Analog Revenue Forecast by Product 10
Table 8: Europe Analog Market Forecast (Revenue, Units, and ASP) 12
Table 9: Europe Analog Revenue Forecast by Product 12
Table 10: Japan Analog Market Forecast (Revenue, Units, and ASP) 14
Table 11: Japan Analog Revenue Forecast by Product 15
Table 12: Asia Pacific Analog Market Forecast (Revenue, Units, and ASP) 18
Table 13: Asia Pacific Analog Revenue Forecast by Product 19
Table 14: Worldwide Analog IC Revenue Forecast by Market Segment 21
Table 15: Worldwide Automotive Analog Revenue Forecast by Product Type 24
Table 16: Worldwide Automotive Analog Revenue Forecast by Application 25
Table 17: Worldwide Automotive Electronics Revenue Forecast by Application 26
Table 18: Worldwide Automotive Electronics Shipment Forecast by Application 27
Table 19: Worldwide Computer Analog Revenue Forecast by Product Type 30
Table 20: Worldwide Computer Analog Revenue Forecast by Application 31
Table 21: Worldwide Computer Electronics Revenue Forecast by Application 32
Table 22: Worldwide Computer Electronics Shipment Forecast by Application 33
Table 23: Worldwide Consumer Analog Revenue Forecast by Product Type 36
Table 24: Worldwide Consumer Analog Revenue Forecast by Application 37
Table 25: Worldwide Consumer Electronics Revenue Forecast by Application 38
Table 26: Worldwide Consumer Electronics Shipment Forecast by Application 39
Table 27: Worldwide Communications Analog Revenue Forecast by Product Type 42
Table 28: Worldwide Communications Analog Revenue Forecast by Application 43
Table 29: Worldwide Communications Electronics Shipment Forecast by Application 44
Table 30: Worldwide Communications Electronics Shipment Forecast by Application 45
Table 31: Worldwide Industrial Analog Revenue Forecast by Product 47

Table 32: Worldwide Industrial Analog Revenue Forecast by Application Area 49
Table 33: Worldwide Industrial Electronics Revenue Forecast by Application Area 49
Table 34: Worldwide Industrial Electronics Shipment Forecast by Application Area 49
Table 35: Worldwide High Performance Analog Revenue Forecast by Product 54
Table 36: Worldwide Standard Performance Analog Revenue Forecast by Product 56
Table 37: Worldwide Standard Analog Revenue Forecast by Product 56
Table 38: Worldwide Standard Analog Shipment Forecast by Product 56
Table 39: Worldwide Amplifier Market Forecast (Revenue, Units, and ASP) 59
Table 40: Worldwide Comparator Market Forecast (Revenue, Units, and ASP) 61
Table 41: Worldwide Amplifier and Comparator (Signal Conditioning) Market Forecast (Revenue, Units, and ASP) 62
Table 42: Worldwide Data Converter Market Forecast (Revenue, Units, and ASP) 64
Table 43: Worldwide Interface Market Forecast (Revenue, Units, and ASP) 66
Table 44: Worldwide Power Management Market Forecast (Revenue, Units, and ASP) 69
Table 45: Worldwide Special Purpose Analog Revenue Forecast by Product 70
Table 46: Worldwide Special Purpose Analog Shipment Forecast by Product 72
Table 47: Worldwide Automotive Specific Market Forecast (Revenue, Units, and ASP) 73
Table 48: Worldwide Computer Specific Market Forecast (Revenue, Units, and ASP) 74
Table 49: Worldwide Consumer Specific Market Forecast (Revenue, Units, and ASP) 76
Table 50: Worldwide Communications Specific Market Forecast (Revenue, Units, and ASP) 78
Table 51: Worldwide Industrial Specific Market Forecast (Revenue, Units, and ASP) 80
Table 52: 2009 and 2008 Worldwide Analog Revenue by Supplier 82
Table 53: 2009 and 2008 Americas Analog Revenue by Supplier 84
Table 54: 2009 and 2008 Europe Analog Revenue by Supplier 86
Table 55: 2009 and 2008 Japan Analog Revenue by Supplier 88
Table 56: 2009 and 2008 Asia Pacific Analog Revenue by Supplier 90
Table 57: 2009 and 2008 Worldwide Standard Linear Revenue by Supplier 92
Table 58: 2009 and 2008 Worldwide Application Specific Analog Revenue by Supplier 93

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.

© 2010 databeans Incorporated

Publication Number: 10ANALOG-Analog

Research Analyst: Susie Inouye
✉ sinouye@databeans.net
Research Analyst: Myson Robles-Bruce
✉ myson@databeans.net
Research Analyst: Matt Scherer
✉ matt@databeans.net