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New analog IC markets seen after 2008 decline

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SAN FRANCISCO—Growth drivers for analog ICs will migrate from mobile phones, multimedia players and general trends in portability and wireless to a new lineage of applications on the horizon in areas such as energy, transportation, health and safety, according to market research firm Databeans Inc.

The leading analog chip companies have all announced activities in these areas, [Databeans](#) (Reno, Nev.) said, with some targeting areas that fit in with currently available expertise and others pursuing multiple areas.

All of the major power management players are targeting the energy market with new products available for conserving power, more efficient power distribution and creating power from renewable sources, Databeans said.

Some companies are focusing specifically on energy conservation while others, such as Texas Instruments Inc., are focusing on all three areas from conserving power to power generation, according to the firm.

The analog market, like the broader IC and electronics markets, is fighting the global drop in demand and stagnant economic conditions in 2009, Databeans said. The analog market is in for another challenging year, but future growth will be driven by so-called green technologies, according to the research firm.

Earlier this week, Wall Street analyst FBR Capital Markets [raised its estimates](#) for Linear Technology Corp., saying the analog market is looking up thanks to the economic stimulus program in China and other factors.

The analog chip market declined 2 percent in 2008 to \$35.6 billion, with the majority of top 10 analog suppliers experiencing larger drops as they struggled to maintain supremacy against smaller players, according to Databeans.

[TI](#) (Dallas) remained the No. 1 analog chip vendor in 2008, despite seeing its market share decline to 14.1 percent from 14.4 percent, [Databeans](#) said.

The No. 2 analog player, Europe's STMicroelectronics, grew its analog business 1 percent from \$3.8 billion in 2007 to \$3.9 billion in 2008, thanks largely to the weakening of the dollar and consolidation of the ST and NXP wireless businesses, Databeans said.

2007 and 2008 Worldwide Analog Market Share by Supplier

Company	2008 Rank	2008 \$M	2008 Share	2007 Rank	2007 \$M	2007 Share	Y/Y %
Texas Instruments	1	5,009	14.1%	1	5,247	14.4%	-5%
STMicroelectronics	2	3,902	10.9%	2	3,844	10.5%	1%
Infineon Technologies	3	2,786	7.8%	3	3,327	9.1%	-16%
Analog Devices	4	2,268	6.4%	5	2,195	6.0%	3%
NXP Semiconductors	5	2,148	6.0%	4	2,675	7.3%	-20%
National Semiconductor	6	1,567	4.4%	6	1,703	4.7%	-8%
Maxim Integrated Products	7	1,491	4.2%	7	1,530	4.2%	-3%
Linear Technology	8	1,155	3.2%	9	1,085	3.0%	6%
Freescale Semiconductor	9	1,090	3.1%	8	1,245	3.4%	-12%
RF Micro Devices	10	935	2.6%	11	993	2.7%	-6%
Other		13,287	37.3%		12,609	34.6%	5%
Total		35,636			36,453		-2%

Source: databeans Estimates, Company Reports

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Thanks to a stormy 2008 business environment with lower demand for wireless products, third-ranked player Infineon Technologies AG saw revenue decline 16 percent to \$2.8 billion, according to Databeans.

By focusing more upon core competencies such as amplifiers and data converters, Analog Devices Inc. outperformed the market and posted a modest gain of 3 percent from \$2.2 billion or 6 percent of the market in 2007, up to \$2.3 billion or 6.4 percent of the market in 2008, Databeans said.

National Semiconductor Corp.'s market share fell from 4.7 percent in 2007 to 4.4 percent of the market in 2008, Databeans said. Nationals analog revenue declined to \$1.6 billion from \$1.7 billion after a particularly weak fourth quarter, the market research firm said.

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