ABSTRACT

This report provides a comprehensive analysis of market trends in power management ICs for battery-powered portable devices. This landmark report is segmented into eight Sections addressing the market, applications, products, and technologies.

Section Two provides the key findings and implications which serve as an executive summary.

Section Three introduces the twelve key portable device types and provides insights into their power management IC content. The selected device types account for more than 90% of the total market for power management ICs in portable devices.

Section Four introduces the methodology that we used to generate the 2008 and the 2008-2013 data for power management ICs in portable devices.

Section Five provides detailed market estimates for power management ICs in portable devices. These include the total market by twelve portable device types and eleven power applications common to all portable devices, as well as a bill of materials (BOM) for each portable device type.

Section Six focuses on fourteen select analog IC vendors and their competitive positions as an illustration of current strategies that address business opportunities in power management ICs in portable devices.

Section Seven introduces the eleven power applications in portable devices and provides insights into IC product types used in those applications.

Section Eight focuses on power management IC products and IC integration strategies for each of the eleven power applications. This unique section introduces an important product planning concept and methodology which is a prerequisite for assessing market opportunities and their technology implications in power management ICs.

TABLE OF CONTENTS

1 INTRODUCTION

2 KEY FINDINGS and IMPLICATIONS

3 BATTERY-POWERED PORTABLE DEVICES
   3.1 Battery Powered Portable Device Types
   3.2 Notebook/Tablet PC Device
   3.3 NETbook PC Device
   3.4 Multimedia/Smart Cell Phone Device
   3.5 Entry/Mainstream Cell Phone Device
   3.6 Mobile Internet Device
   3.7 Portable/Personal GPS Navigation Device
   3.8 MP3/MP4 Player Device
   3.9 Digital Still Camera Device
   3.10 Bluetooth Headset Portable Device
   3.11 Digital Picture/Photo Frame Device
   3.12 Portable Ultrasound Device
3.13 Portable Medical Meter Device

4 PETROV GROUP MARKET DATA METHODOLOGY

5 MARKET for POWER MANAGEMENT ICs in PORTABLE DEVICES
5.1 Forecast for Power Management ICs by Device Type and Application (2008 to 2013)
5.2 2008 Market for Portable Devices
5.3 Portable Device BOM Data

6 COMPETITIVE MAP – SELECT POWER MANAGEMENT IC VENDORS
6.1 Analog Devices (ADI)
6.2 AnalogicTech (AATI)
6.3 Dialog Semiconductor
6.4 Freescale Semiconductor
6.5 Infineon Technologies
6.6 Intersil
6.7 Linear Technology
6.8 Maxim Integrated Products
6.9 Monolithic Power Systems (MPS)
6.10 National Semiconductor
6.11 Power Analog Microelectronics (PAM)
6.12 STMicroelectronics
6.13 Texas Instruments (TI)
6.14 Rohm Semiconductor
6.15 Financial performance comparison of analog IC vendors

7 POWER APPLICATIONS in PORTABLE DEVICES
7.1 Model of Portable Device Power Applications
7.2 Battery/Battery-Pack Charging and Measurement Application
7.3 Core and I/O Power Application
7.4 RF Power Application
7.5 Sensor Power Application
7.6 Motor Control power Application
7.7 Display Power Application
7.8 Memory Card Power Application
7.9 Memory/Bus Power Application
7.10 Audio Power Application
7.11 Lighting Management Application
7.12 System Power Application

8 PRODUCT CATEGORIES and IMPLEMENTATION STRATEGIES
8.1 Power Management IC Integration Trends in Portable Devices
8.2 Integration Domains for Power ICs in Portable Devices
  8.2.1 System power functions (single/multi-function and single/multi-channel)
  8.2.2 Application functions (single/multi-function and single/multi-channel)
  8.2.3 Integrated application and system power functions
  8.2.4 Integrated application and system functions
  8.2.5 Integrated system power and system functions
  8.2.6 Integrated application, system power, and system functions
8.3 Power Management Integration Trends by Portable Device Application
  8.3.1 Battery charging and management application
  8.3.2 Lighting management application
  8.3.3 Core and I/O power application
  8.3.4 Display power application
  8.3.5 Audio power application
  8.3.6 RF Power Application
  8.3.7 Motor Control power Application
  8.3.8 System power application
8.3.9 Memory card power application
8.3.10 Sensor power application
8.3.11 Memory/bus power application

8.4 Power Management ICs versus Transistor Count
8.5 Semiconductor Process Technology
8.6 Role of Discrete Power MOSFETs
8.7 Standalone ESD/EMI Protection Devices
8.8 Analog versus Digital Implementation Approaches

LIST OF FIGURES

3.1 Three Basic Categories of Portable Devices
3.2 Overview of the Twelve Analyzed Portable Devices
3.3 Functional Diagram of Notebook PC
3.4 Functional Diagram of NETbook PC
3.5 Functional Diagram of High-end Multimedia Cell Phone
3.6 Functional Diagram of Entry/Mainstream Cell Phone
3.7 Functional Diagram of Mobile Internet Device
3.8 Functional Diagram of Portable GPS Navigation Device
3.9 Functional Diagram of an MP3/MP4 Player
3.10 Functional Diagram of Digital Still Camera
3.11 Functional Diagram of Bluetooth Headset
3.12 Functional Diagram of Digital Picture Frame Device
3.13 Functional Diagram of Portable Ultrasound Device
3.14 Functional Diagram of Portable Medical Meter Device

4.1 PG Market Data Generation Methodology
4.2 Portable Device Components not Included in BOM
4.3 BOM Source Example
4.4 BOM Data Example for Digital Still Camera—Power Management IC Units and Revenues
4.5 Market Data Example—Step 4 of Methodology
4.6 Market Data Example—Step 5 of Methodology

5.1 Market Data for the Functional Content of 12 Portable Device Types (2008)
5.2 1.9B Devices Sold in 2008 by Analyzed Device Type
5.3 Power Management ICs Value vs. System ICs Value
5.4 Market Data for 12 Portable Device Types and 11 Power Applications—Power Management ICs
5.5 Distribution of Power Management IC Revenues for 12 Portable Device Types ($M)
5.6 Distribution of Power Management IC Units for 12 Portable Device Types (B units)
5.7 Market Forecast for Power Management ICs by Device Type and Application (2008 to 2013)
5.8 Key Market Forecast Assumptions (2008 to 2013)
5.9 Forecasted Power Management IC Units and Revenues (2008 to 2013)
5.10 Power Management ICs for Entry/Mainstream Cell Phone—Units and Revenues (2008)
5.11 Power Management ICs for High-end Multimedia Cell Phone—Units and Revenues (2008)
5.12 Power Management ICs for Notebook PC—Units and Revenues (2008)
5.14 Power Management ICs for Digital Still Camera—Units and Revenues (2008)
5.15 Power Management ICs for Portable GPS Navigation Device—Units and Revenues (2008)
5.16 Power Management ICs for Portable Medical Meters—Units and Revenues (2008)
5.17 Power Management ICs for Bluetooth Headset—Units and Revenues (2008)
5.18 Power Management ICs for Digital Picture Frame Device—Units and Revenues (2008)
5.20 Power Management ICs for Mobile Internet Device—Units and Revenues (2008)
5.21 Power Management ICs for Portable Ultrasound Device—Units and Revenues (2008)
5.22 Typical Number of Power Management ICs by Device Type (2008)
5.23 BOM Data for 12 Analyzed Portable Devices
6.1 Comparison of Analog IC Vendors by Portable Device Application
6.2 Financial Performance Comparison of Analog IC Vendors (2008)(1)

7.1 Portable Devices—The Big Picture
7.2 PG Model of Portable Device Power Applications
7.3 Multi-Function/Channel PMU for Battery Charging/Management Application
7.4 Battery Pack Power Management Solution
7.5 Handheld Processor Oriented PMU
7.6 Notebook Processor Oriented PMU
7.7 Power Supply for RF Power Amplifier Modules
7.8 Power Supply for CCD Image Sensors
7.8a Power Supply for Biometric Sensor
7.9 Digital Still Camera Lens Driver
7.10 Power Supply for LCD Displays and Panels
7.11 Memory Card Power, Protection, and Interface IC
7.12 DDRII Memory/Bus Termination IC
7.13 Class-D Power Amplifier Drivers
7.14 PMU with Audio
7.15 Lighting Management Unit (LMU)
7.15a Candybar and MM/Smart Cell Phone LMU Applications
7.16 System Power DC/DC Converter
7.17 Integrated System Power Load Switch

8.1 Two Major and Distinct Product Categories
8.2 Multi-Channel / Multi-Function LED Driver
8.3 Power Management IC Categories and Integration Domains
8.4 Power Management ICs Integration Tends vs. Select IC Vendors
8.5 Power Management IC Value Metric—Price per Transistor
8.6 Gross Margin of Analog IC Vendors vs. Targeted Integration Domains
8.7 Power Management ICs Integration Trends by Portable Device Application Category
8.8 Power Management ICs vs. Transistor Count by Application Category
8.9 DSP-Based Field Programmable DC/DC Converter