

# Introduction to the power IC market 2018



# WHAT ABOUT THE MARKET UPDATE?

The objectives of the report are to:

- Access the gate driver market for Power Management ICs including switching regulators, LDOs, Battery Management ICs, Multi-channel Power Management ICs, and other key power ASICs
- Understand the market dynamics for Power Management IC applications
- Access end market breakdowns for over 40 end markets and over 15 power IC components
- Provide an overall view of the competitive landscape of the power management IC market

## Key features of the market update

- Update about the power management Integrated Circuits (IC) and their end applications.
- Market size and market share information in US dollars for power ICs
- Revenue forecast for the power IC market for 2018-2023
- Key application and sector size breakdown in each of the five key markets: automotive, consumer, computing, communications, industrial
- Market breakdown by type of power management ICs, including switching regulators, controllers, linear regulators, low drop-out regulators, voltage references, supervisors, switches, multichannel power management ICs, and other power Application Specific ICs (ASIC)
- End market analysis with detail end market breakdowns
- Market share and market leader information by type of power management ICs



## Power ICs Update 2017

Pivot Table 3. Annual Revenue Forecast by Component

Note: Hot Swap Controller and PoC Controllers are part of Supervisor, Controllers Category and are excluded from the Grand Total

Market	(All)								
Submarket	(All)								
Revenue (k\$ USD)	Sum of Y2016	Sum of Y2017	Sum of Y2018	Sum of Y2019	Sum of Y2020	Sum of Y2021	Sum of Y2022	Sum of Y2023	
AC-DC Switching Regulators	43	47.3	51.6	55.9	60.2	64.5	68.8	73.1	
BMICs	43	47.3	51.6	55.9	60.2	64.5	68.8	73.1	
DC-DC Switching Regulators	43	47.3	51.6	55.9	60.2	64.5	68.8	73.1	
Isolated Switching Controllers	43	47.3	51.6	55.9	60.2	64.5	68.8	73.1	
LDO Regulators	43	47.3	51.6	55.9	60.2	64.5	68.8	73.1	
Monolithic Power Stage	43	47.3	51.6	55.9	60.2	64.5	68.8	73.1	
Multichannel PMICs	43	47.3	51.6	55.9	60.2	64.5	68.8	73.1	
Multi-Chip Power Stage	43	47.3	51.6	55.9	60.2	64.5	68.8	73.1	
Non-Isolated Switching Controllers	43	47.3	51.6	55.9	60.2	64.5	68.8	73.1	



Table 1-1: Annual Revenue Forecast by End Market

End Market	Y2016	Y2017	Y2018	Y2019	Y2020	Y2021	Y2022	Y2023
Automotive	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100
Communications	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100
Computing	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100
Consumer	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100
Industrial	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100
Grand Total	\$ 645	\$ 709	\$ 774	\$ 839	\$ 903	\$ 968	\$ 1 032	\$ 1 097

Table 1-2: Annual Growth Rate Forecast by End Market

End Market	Y2016	Y2017	Y2018	Y2019	Y2020	Y2021	Y2022	Y2023
Automotive Growth Rate	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Communications Growth Rate	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Computing Growth Rate	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Consumer Growth Rate	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Industrial Growth Rate	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Total Growth Rate	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%

Texas Instruments	\$1 437	\$1 515	26.6%	27.6%	1.0%
Maxim Integrated	\$707	\$715	13.1%	13.0%	-0.1%
Infineon Technologies	\$257	\$452	4.8%	8.2%	3.5%
Power Integrations	\$340	\$346	6.3%	6.3%	0.0%
Linear Technology	\$279	\$304	5.1%	5.5%	0.5%
ON Semiconductor	\$246	\$239	-4.6%	4.4%	-0.2%
STMicroelectronics	\$197	\$185	-1.6%	3.4%	-0.3%
NXP	\$107	\$182	2.0%	3.3%	1.3%
Monolithic Power Systems	\$146	\$160	2.7%	2.9%	0.2%
Renesas Electronics Corporation	\$62	\$134	1.1%	2.4%	1.3%
Intel	\$133	\$111	-2.5%	2.4%	-0.1%
MediaTek*	\$0	\$130	0.0%	2.4%	2.4%
Microchip	\$88	\$120	1.6%	2.2%	0.6%
Dialing Semiconductor	\$111	\$119	2.1%	2.2%	0.1%
ROHM Semiconductor	\$119	\$113	-2.2%	2.1%	-0.1%
Semtech	\$103	\$112	1.9%	2.0%	0.1%
Analog Devices **	\$82	\$87	1.5%	1.6%	0.1%
Lite-On Semiconductor	\$81	\$87	1.5%	1.6%	0.0%
Alpha and Omega Semiconductor	\$54	\$56	1.0%	1.0%	0.0%
Visay Intertechnology	\$11	\$17	0.6%	0.7%	0.1%
Other Companies	\$825	\$289	15%	15%	-10.4%
WSTS Total	\$6 461	\$7 491	100%	100%	



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