

DIGITAL POWER ICs

High Growth Opportunities for IC and Foundry Vendors

ABSTRACT

The purpose of this report is to deliver an up-to-date understanding of the digital power IC market landscape from five major perspectives:

- Digital power ICs technology and market
- Market dynamics, segmentation, and growth trends
- Competitive vendor positions and approaches
- Digital power ICs technology segments, drivers and trends
- In-depth analyses of the digital power product lines of 22 IC vendors

Texas Instruments
Microchip Technology
Exar (FyreStorm)
Akros Silicon
iWatt
Powervation
CHiL Semiconductor
Power-One

Fairchild Semiconductor
Intersil (Zilker Labs)
Freescale Semiconductor
Silicon Labs
Infineon Technologies (Primarion)
Maxim Integrated Products
Linear Technology

Analog Devices
International Rectifier
STMicroelectronics
Marvell Technology Group
Volterra Semiconductor
Summit Microelectronics
IDT (Tundra/Potentia Semiconductor)

The findings in this report are based on a bottom-up analysis of vendor product offerings; it is our experience that only such an effort can result in a pragmatic formulation and validation of market size, growth, and segmentation. A key benefit of our report is that it is comprehensive; it provides both a Big Picture view and detailed product analyses.

The report removes the hype and misunderstandings regarding this complex and now high-growth market segment. Audiences who will benefit from this report include decision-makers in business development, competitive intelligence, strategic and product marketing, and general management areas.

The landscape of Digital Power ICs is changing fast because the market has entered its high-growth stage – 2009-2014 CAGR of 34%. By 2014 the Digital Power IC market will be a multibillion business; its control IC segment will be about six times larger than its management IC segment or about 86% of total Digital Power IC revenues.

Our bottom-up analysis shows that its 2009 revenues were more than five times larger than the estimates made by other data sources. Despite the high growth, by 2014 penetration rates will still remain relatively low, providing large future growth opportunities as the market transitions into a more mature stage driven by mainstream applications.

Digital power management (DPM) ICs	30%
Digital power control (DPC) ICs	34%
▪ AC/DC and DC/AC power conversion ICs	35%
▪ Switching DC/DC power conversion ICs	35%
– Controllers	30%
– Converters	46%
Total	34%

This report covers the present high growth stage of the digital power market lifecycle in terms of introduced product types, end-market segments, and end-equipment applications. Despite high market growth, the penetration rates will remain relatively low, providing significant growth opportunities for well-positioned vendors by 2014 and beyond.

The report analyzes IC vendors' strategies in emerging and legacy Digital Power IC market opportunities. From the power supply system viewpoint power conversion ICs are analog power devices -- regardless of how they are internally implemented. Therefore, digital power IC vendors must possess extensive analog business know-how in addition to digital design know-how. [Therefore, this report should also be viewed as a companion report to our Analog Power Conversion ICs report which focuses on analog power ICs.](#)

Digital control techniques can be applied at several points within a power system, both internal to power conversion devices (power control) and at the system level (power management) for the purpose of implementing control and monitoring. This report covers both applications of digital power control. Power management and control solutions using digital techniques have been used since the early 1980s in applications such as motor control. However, new applications and the emergence of power buses have dramatically accelerated the need for digital power management and control.

There is a broad range of digital design implementations used by IC vendors to address an even broader range of applications. This report provides an in-depth view of the major implementation approaches illustrated with numerous specific design examples of the 22 IC vendors analyzed. There are five major integration approaches to implementing full digital power conversion solutions ranging from discrete to modules. Each major integration approach features a range of integration variants, some of which require specialized processing technologies.

Implementation	Integration Options			Tradeoffs	Representative IC Vendors
Module	ICs, power MOSFETs/IGBTs, passives			Faster design-in with complete power conversion solutions	Marvell, IRF, Volterra, TI
Single-chip	Digital controller	Drivers	Power MOSFETs	Cost and size tradeoffs	Marvell, Akros, Volterra
Chipset	Digital controller	Drivers + Power MOSFETs			TI, Infineon (Primarion), Volterra
Integrated (controller + driver)	Digital controller + drivers		Power MOSFETs/IGBTs		Exar, iWatt, Marvell
Discrete (IC)	Digital controller	Drivers	Passive components	Design flexibility and efficiency focus	14 out of 21 analyzed IC vendors

The report maps how the analyzed Digital Power IC vendors address the five major integration options of digital power solutions (including hybrid implementations).

Market segment by product category	High end computing	High end storage	High end networking	Telecom infrastructure	Solar, lighting	Power over Ethernet	Motor control	High end digital consumer	Automotive
Digital power management (DPM) ICs									
▪ Board level	●	●	●	●					
▪ Chip level (SoC)								●	
Digital power control (DPC) ICs									
▪ Software programmable	●	●	●	●				●	●
▪ User-configurable hardware based	●	●	●	●	●	●	●	●	●
▪ Fixed configuration hardware based					●			●	

Digital power technology has broadly penetrated to different degrees practically all major end-market segments. Their currently low penetration rates provide a broad base of opportunities. The key market penetration requirement is achieving cost parity with the established analog power solutions.

Understanding the nature of a Digital Power IC vendor's business is critical for investors and foundries engaging with those vendors in order to maximize their longer term business potential beyond the early market entry stage; many entrants have already failed.

IC Vendor	High-end				Solar, Lighting	Power over Ethernet	Motor control	High-end consumer
	Computing	Storage	Networking	Telecom				
Texas Instruments	•	•	•	•			•	
Microchip	•	•		•			•	
Exar	•	•	•	•				•
Akros			•	•		•		
iWatt			•		•			•
Powervation	•	•	•					
CHiL Semiconductor	•	•						
Fairchild	•		•	•	•			•
Intersil	•	•	•	•				
Freescale							•	
Silicon Labs			•				•	•
Infineon	•	•	•	•				
Maxim	•	•	•	•				
Linear Technology	•		•					
Analog Devices	•		•	•				
International Rectifier							•	
STMicroelectronics					•		•	
Marvell	•	•	•	•				•
Volterra	•	•	•					•
Summit Microelectronics								•
IDT		•	•					

Digital Power ICs have numerous and significant implications for silicon foundries. The playing field for foundries is larger in comparison to traditional analog opportunities. The nature of the digital power IC business is favorable to foundries from several aspects:

- New market entrants are fables vendors or IDMs in need of finer process nodes
- Accelerated nodal migration when compared to analog power products
- Potential for larger volume business per customer and product type

Digital power solutions enable and motivate IC vendors to enter into the module business, which has traditionally been the domain of power system vendors. This trend could reshape the traditional business boundary between power system and IC vendors.

The report is structured into seven sections. [Section 2](#) serves as an executive summary providing key findings and implications. [Section 3](#) scopes the digital power IC market and technology trends from seven perspectives:

- Power system design trends
- Power distribution architecture trends
- Power conversion component and material trends
- Digital versus analog power control and management
- Segmentation of digital power control and management ICs
- Segmentation of digital power ICs implementation approaches
- Digital versus hybrid versus analog power ICs – benefits and limitations

[Section 4](#) scopes the market dynamics and segmentation trends from four perspectives:

- Market landscape trends
- Market segmentation of digital power ICs
- Market penetration opportunities and strategies
- Market size and growth trends (2009 to 2014)

[Section 5](#) provides a view of the competitive positions of the 21 participating IC vendors in terms of:

- Comparison of key product portfolio attributes
- Alliances, partnerships, and acquisitions

- Market entry business and product strategies
- End-equipment application targets

Section 6 focuses on the technology aspects of digital power ICs:

- Integration trends
- Process and nodal technology trends
- Implications and opportunities for silicon foundries

Section 7 covers each of the 22 IC vendors in terms of their product portfolios and how they approach the market opportunities for digital power ICs. The coverage of the Power-One power systems vendor is included because its patented technology has significant implications for the overall market for digital power systems as well as for IC vendors.

The high growth market for digital power ICs is in a state of flux characterized by acquisitions, formation of partnerships, and increasing competition. Digital power ICs are not only changing the power management market landscape, but also the role of foundries in the analog/mixed signal market.

TABLE of CONTENTS (146 pages, 97 figures)

1	INTRODUCTION
2	KEY FINDINGS AND IMPLICATIONS (Total of 28 Findings and their Implications)
3	DIGITAL POWER ICs TECHNOLOGY AND MARKET
3.1	Power System Design Trends
3.2	Power Distribution Architecture Trends
3.2.1	Centralized power architecture (CPA)
3.2.2	Distributed power architecture (DPA)
3.2.3	Intermediate bus architecture (IBA)
3.2.4	Factorized power architecture (FPA)
3.3	Power Conversion Component and Material Trends
3.4	Digital versus Analog Power Control and Management
3.4.1	Power control aspects of power supplies
3.4.2	Power management aspects of power supplies
3.4.3	Analog power control
3.4.4	Digital power control
3.5	Segmentation of Digital Power Control and Management ICs
3.5.1	Digital power management ICs
3.5.2	Digital power control ICs
3.6	Segmentation of Digital Power ICs Implementation Approaches
3.6.1	Digital power control-loop ICs
3.6.2	Discrete integration approach
3.6.3	Chipset integration approach
3.6.4	Integrated digital power controller and power MOSFET/IGBT drivers
3.6.5	Single-chip solution
3.6.6	Module
3.6.7	Hybrid (analog/digital) solutions

- 3.6.8 IC vendor approaches to digital power IC segmentation
 - 3.7 Digital vs. Hybrid vs. Analog Power ICs—Benefits and Limitations
- 4 MARKET DYNAMICS, SEGMENTATION, AND TRENDS
 - 4.1 Market Landscape Trends—the Big Picture
 - 4.2 Market Segmentation of Digital Power ICs
 - 4.2.1 Digital power IC market segments vs. applications
 - 4.3 Market Penetration Opportunities and Strategies
 - 4.3.1 Strategies emphasizing full digital power control benefits
 - 4.3.2 Strategies minimizing full digital power control limitations
 - 4.3.3 Strategies for hybrid (analog/digital) power conversion solutions
 - 4.4 Digital Power ICs—Market Size and Growth Trends (2009 to 2014)
 - 4.4.1 Hybrid (analog control loop/digital power management) implementations
 - 4.4.2 Market trends by application areas
- 5 COMPETITIVE VENDOR POSITIONS AND TRENDS
 - 5.1 Comparison of Digital Power IC Vendors by Key Product Portfolio Attributes
 - 5.2 Alliances, Partnerships, and Acquisition Trends
 - 5.3 End-equipment Application Targets
- 6 DIGITAL POWER ICs TECHNOLOGY TRENDS
 - 6.1 Integration Trends
 - 6.2 Process and Nodal Technology Trends
 - 6.3 Implications and Opportunities for Silicon Foundries
- 7 ANALYSES OF DIGITAL POWER IC PRODUCT LINES OF [22 VENDORS](#)
 - 7.1 Texas Instruments
 - 7.1.1 Digital power controllers (digital signal controllers, DSC)
 - 7.1.2 Digital power non-isolated point-of-load (POL) DC/DC controllers
 - 7.1.3 Digital power control drivers and power stage implementations
 - 7.1.4 Other digital power products
 - 7.1.5 Summary of TI's approach to digital power
 - 7.2 Microchip Technology
 - 7.2.1 Summary of Microchip's approach to digital power
 - 7.3 Exar (FyreStorm)
 - 7.3.1 Summary of Exar's approach to digital power
 - 7.4 Akros Silicon
 - 7.4.1 PoE Power SoCs – AS18x4 family
 - 7.4.2 DC/DC SoCs – AS14x4 family
 - 7.4.2 Summary of Akros' approach to digital power
 - 7.5 iWatt
 - 7.5.1 AC/DC controller ICs for power adapters/chargers
 - 7.5.2 AC/DC controller ICs for LED lighting
 - 7.5.3 Summary of iWatt's approach to digital power
 - 7.6 Powervation
 - 7.6.1 Summary of Powervation's approach to digital power

- 7.7 CHiL Semiconductor
 - 7.7.1 Digital multiphase DC/DC buck controllers
 - 7.7.2 Power MOSFET drivers
 - 7.7.3 Summary of CHiL's approach to digital power
- 7.8 Fairchild Semiconductor
 - 7.8.1 Summary of Fairchild's approach to digital power
- 7.9 Intersil (Zilker Labs)
 - 7.9.1 Digital buck controllers and converters
 - 7.9.2 Power MOSFET drivers
 - 7.9.3 Summary of Intersil's approach to digital power
- 7.10 Freescale Semiconductor
 - 7.10.1 Summary of Freescale's approach to digital power
- 7.11 Silicon Labs
 - 7.11.1 Control processor
 - 7.11.2 System management processor
 - 7.11.3 Summary of Silicon labs' approach to digital power
- 7.12 Infineon Technologies (Primarion)
 - 7.12.1 Summary of Infineon's approach to digital power
- 7.13 Maxim Integrated Products
 - 7.13.1 Summary of Maxim's approach to digital power
- 7.14 Linear Technology
 - 7.14.1 Summary of Linear's approach to digital power
- 7.15 Analog Devices
 - 7.15.1 Summary of ADI's approach to digital power
- 7.16 International Rectifier
 - 7.16.1 Digital motor control ICs
 - 7.16.2 Driver ICs for driving IGBTs and power MOSFETs
 - 7.16.3 Intelligent power modules
 - 7.16.4 Digital motor drive modules
 - 7.16.5 Summary of IRF's approach to digital power
- 7.17 STMicroelectronics
 - 7.17.1 Summary of STM's approach to digital power
- 7.18 Marvell Technology Group
 - 7.18.1 Summary of Marvell's approach to digital power
- 7.19 Volterra Semiconductor
 - 7.19.1 Master digital power controller
 - 7.19.2 Smart slave power stages
 - 7.19.3 Summary of Volterra's approach to digital power
- 7.20 Summit Microelectronics
 - 7.20.1 Summary of Summit's approach to digital power
- 7.21 IDT (Tundra/Potentia Semiconductor)
 - 7.21.1 Summary of IDT's approach to digital power
- 7.22 Power-One
 - 7.21.1 Summary of Power-One's approach to digital power

List of Figures

- 3.1 The Power System Design Triangle
- 3.2 Power Distribution Architecture Trends
- 3.3 Analog Power Control
- 3.4 Digital Power Control
- 3.5 Digital Power Control with Extended System Control Capabilities
- 3.6 Digital Power Control and Management Segmentation Hierarchy
- 3.7 Segmentation of Digital Power Control and Management ICs
- 3.8 Analog Control Loop DC/DC Converters Controlled by a Digital Power Management IC (Maxim's MAX8688)
- 3.9 Chip Level Digital Power Management of Multiple DC/DC Converters/Controllers (Summit's SMB118)
- 3.10 Digital Power Management in Analog and Digital Power Conversion ICs
- 3.11 DC/DC Converter Using Digital Control Loop with Digital/Analog Peripheral Functions Control (Marvell's 88PG877)
- 3.12 Integration Trends of Digital Power Control-Loop ICs
- 3.13 Discrete Implementation Approach Using a TI's Digital Power Controller IC
- 3.14 Chipset Implementation Approach to Digital DC/DC Converters
- 3.15 Integrated Digital Power Controller and MOSFET/IGBT Drivers
- 3.16 Single-chip Digital Power Converter
- 3.17 Digital Power DC/DC Converter Module
- 3.18 Integration Trends of Hybrid (Analog/Digital) Power Conversion ICs
- 3.19 Discrete Implementation of Hybrid (Analog/Digital) Power Conversion ICs
- 3.20 Single-chip Hybrid (Analog/Digital) Power Conversion ICs
- 3.21 Integration Options of Digital Power ICs by IC Vendor
- 3.22 Comparison of Digital, Hybrid, and Analog Power IC Implementation Approaches
- 3.23 Size Comparison Example of Digital and Analog point-of-Load (POL) Converter Implementations (Ericsson Power Modules)

- 4.1 Digital Power IC Market Segments versus Primary Applications
- 4.2 Overview of Market Penetration Strategies for Digital Power ICs
- 4.3 Digital Power ICs Lifecycle Patterns
- 4.4 Digital Power ICs Market Size and Growth Trends by Key Segments (2009 to 2014)

- 5.1 Digital Power ICs Implementation Approaches by IC Vendor
- 5.2 Overview of Vendor Alliances, Partnerships, and Acquisitions
- 5.3 Primary End-Equipment Applications for Digital Power ICs by IC Vendor

- 6.1 Integration Trends of Full Digital Power Conversion Solutions
- 6.2 Process Technology Requirements of Full Digital Power Control ICs

- 7.1 TI's AC/DC Digital Power Products and Applications—Full Digital Control
- 7.2 Solar Power Inverter Example Using a TI's Digital Power Controller
- 7.3 TI's Digitally Managed Analog PWM Controllers
- 7.4 TI's Full Digital Control PWM Controller (UCD9240)
- 7.5 TI's Digital Power Control Driver IC (UCD7230)
- 7.6 TI's Digital Power Module (PDT08A015W PowerTrain™ Module)
- 7.7 TI's Digitally Programmable Sequencers
- 7.8 TI's Digital Power Monitor and Sequencer (UCD90120)
- 7.9 Summary of TI's Digital Power Product Portfolio
- 7.10 Microchip's Level 3 Integration LED Application (PIC16HV785)
- 7.11 Microchip's Digitally Managed Analog PWM Controller (MCP1631HV)
- 7.12 Microchip's Full Digital Implementation of a Power Factor Correction (PFC) Application (dsPIC33FJ16GS502)
- 7.13 Overview of Microchip's Digital Power Product Portfolio
- 7.14 Comparison of Exar's XRP7704 and TI's UCD9240 Digital Power Controller Solutions—Used Silicon Area

- 7.15 Quad DC/DC Converter Using Exar's XRP7740 Digital Power Controller
- 7.16 Akros' Power-over-Ethernet (PoE) Powered Device (PD)--Digital Power Controller SoC (AS1854)
- 7.17 Akros' Direct-Line Digital Power DC/DC SoC (AS1454)
- 7.18 iWatt's Digital Power AC/DC Control IC for Power Adapters/Chargers (iW1692)
- 7.19 iWatt's Digital Power AC/DC Controller for LED Lighting (iW3620)
- 7.20 Powervation's Digital Point-of-Load DC/DC Controller for Computing, Networking, and Storage Applications (PV3002)
- 7.21 CHiL Semiconductor's Digital DC/DC Controllers
- 7.22 CHiL Semiconductor's Digital DC/DC Controller for Server Applications
- 7.23 CHiL Semiconductor's Power MOSFET Driver and Application (CHL8500)
- 7.24 Fairchild's Point-of-Load (POL) Digital Power Conversion ICs
- 7.25 Intersil's Point-of-Load (POL) Digital Power Conversion ICs
- 7.26 Intersil's Digital DC/DC Synchronous Buck Converter (ZL2106)
- 7.27 Intersil's Digital-DC Compatible Synchronous Buck MOSFET Driver (ZL1505)
- 7.28 Digital Signal Controller (DSC) Power Conversion Applications
- 7.29 Digitally Controlled AC/DC Power Supply Using Freescale's Digital Signal Controllers
- 7.30 Solar Panel Renewable Energy Application
- 7.31 Freescale's Digital Dimming Ballast for Lighting Applications (56F8014)
- 7.32 Freescale's Digital Signal Controller Roadmap
- 7.33 Freescale's 56F801x DSC Family Product Features
- 7.34 Silicon Labs' Dedicated Hardware Based Digital PWM Controller (Si825x)
- 7.35 Point-of-Load (POL) and Power Factor Correction (PFC) Applications Using Silicon Labs' Si825x Digital PWM Controllers
- 7.36 Infineon's Digital Power ICs by Application
- 7.37 Infineon's Multiphase Digital Integrated Power Conversion and Management IC (PX7542)
- 7.38 Infineon's Power MOSFET Driver (PX3511A)
- 7.39 Maxim's Digital Controller/Monitor for Analog Point-of-Load Power Supplies
- 7.40 Linear's Digital Power Controller IC (LTC7510/Infineon's PX7510)
- 7.41 On-Board Digital Power Management Architecture Using Linear's Digital Power Management IC (LTC2978)
- 7.42 Linear's Application and Functional Content of Digital Power Management IC (LTC2978)
- 7.43 ADI's Digital Power Monitor (ADM1192)
- 7.44 ADI's Digital Power Controller for Isolated AC/DC or DC/DC Applications (ADP1043A)
- 7.45 ADI's AC/DC Power Supply Application for a Secondary Side Digital Power Controller (ADP1043)
- 7.46 International Rectifier's Digital Motor Control Design Platform
- 7.47 International Rectifier's Digital Motor Control ICs
- 7.48 International Rectifier's Digital Motor Control ICs Architecture
- 7.49 IRF's Sensorless Digital Motor Control IC for Consumer Appliances (IRMCK312)
- 7.50 Motor Drive System Using IRF's Digital Control ICs and Power Modules
- 7.51 IRF's Digital Sensorless Motor Drive Module for Aerospace Applications (IRMCT3UF1)
- 7.52 STM32 Microcontroller for Digital Motor Control Applications
- 7.53 Marvell's Portfolio of Digital DC/DC Power Conversion ICs
- 7.54 Marvell's Field Programmable Digital DC/DC Point-of-Load (POL) Converter (88PG877)
- 7.55 V_{set} and P_{set} Programming Table for Output Voltage Setting (Marvell's Digital POL Converters)

- 7.56 Marvell's Digital Power Module
- 7.57 Volterra's Coupled-Inductor DC/DC Converter Approach
- 7.58 PC Motherboard Implementation Using Volterra's Digital Power ICs
- 7.59 Volterra's Multiphase DC/DC Converter Implementation Using Master-Slave Architecture
- 7.60 Volterra's Digital Power Controller Device Architecture
- 7.61 Volterra's Smart Slave Power Stage Architecture
- 7.62 Summit's Digitally Programmable DC/DC System Power Manager for Portable/Handheld Applications (SMB110)
- 7.63 IDT/Tundra's Secondary Side Digital Power Controller Application
- 7.64 IDT/Tundra's Primary Side Digital Power Controller Application
- 7.65 Power-One's Z-One Digital Power System Architecture