

# BATTERY MANAGEMENT ICs

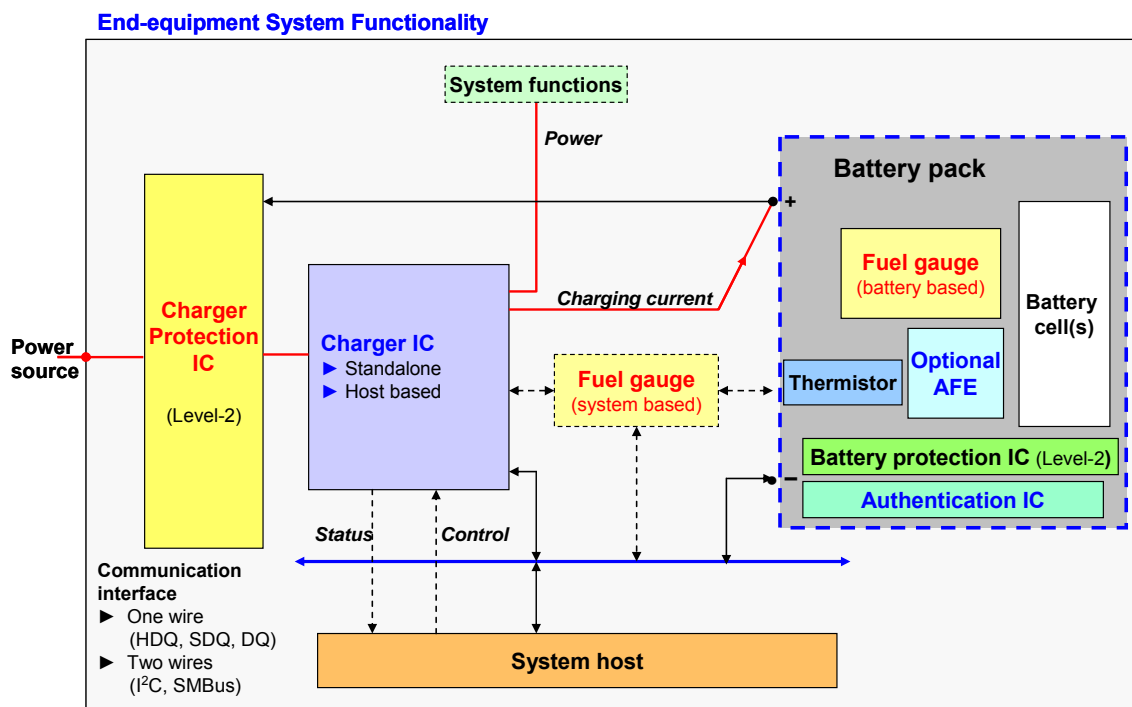
## From Headsets to Electric Vehicles

### ABSTRACT

This landmark report delivers an in-depth analysis of the fast changing \$3B+ battery management IC market. The requirement for power-efficient and high performance solutions in Li-Ion/Poly battery-powered devices continues to open profitable growth opportunities for existing IC vendors (profit-driven Linear Technology is a major participant) as well as for numerous start-up entrants.

Battery management ICs are application-specific and analog-intensive mixed-signal ICs used in numerous end-systems and their battery packs. The complexity and variety of battery management ICs is driven by end-equipment types, battery types, and battery management architectures.

The report provides the product classification and market segmentation used in our bottom-up analysis of products and vendors. The report analyzes various battery charger, fuel gauge, protection, and authentication ICs – more than 600 core products of twenty vendors and eleven end-systems; these core products constitute about 3,000+ standard products. Standalone charger ICs alone accounted for about 1.9B units and \$1.4B revenues in 2009, while standalone fuel gauge ICs accounted for about 1.6B units and \$1.4B in revenues.



The report classifies battery charger ICs into a five-level hierarchy by integration, topology, algorithm execution, input power sources, and application attributes. Fuel gauge ICs are classified by algorithm execution (intelligence), integration, battery chemistry, cell configuration, and protection and monitoring features.

End-equipment power is segmented into three main power levels; energy harvesting devices and electric vehicles are separate emerging segments.

Bipolar is a must process technology for battery management ICs — the use of BiCMOS and BCD dominates. The trend toward universal adapters (“chargers”) requires an added degree of protection and favors increasing use of BCD technology

IC vendor	Total core products	Low power segment	Mid power segment	High power segment
		Low-end DSC, cell phone, media player (1 cell)	DSC, camcorder, PDA, smart phone (1 to 2 series cells)	Notebook PC, medical and military equipment (2 to 4 series cells)
Texas Instruments	245	●	○	○
Linear Technology	82		○	○
Maxim	87		○	●
Intersil	45	●	○	●
Microchip Technology	29	●	○	
AnalogicTech	23	●	○	
Semtech	11	●		
Analog Devices	3	○		●
Freescale	8	○	●	
Atmel	7		○	●
Summit ME	8	●		
National Semiconductor	11	●		
STMicroelectronics	6	●		
Renesas	20	●	○	
Broadcom	3	○	●	
Qualcomm	3	○	●	
ST-Ericsson	3	○	●	
Rohm Semiconductor	5	●		

Linear Technology offers 78 core products — three standalone fuel gauge ICs and 75 core battery charger ICs:

### Single Function Charger ICs:

Battery charger IC type	Core products		Battery attributes			USB 2.0 compliant		Key trends
	#	%	Charge I <sub>max</sub> (A)	# series cells	Type	#	%	
<b>Linear topology</b>	28	100%				7	25%	Most products are for single cell applications.
■ Standalone	23	96%	2	1,2	Li-Ion/Pol	6	21%	
■ Non-standalone	5	4%	1	1	Li-Ion/Pol	1	4%	
<b>Switching topology</b>	26	100%						Charge termination performed by a microcontroller. Some products are USB 2.0 compliant.
■ Standalone	15	58%	8	1 to 16	Li-Ion/Pol, NiMH/NiCd, lead acid	0	0%	
■ Non-standalone	11	42%	8	1 to 16	Li-Ion/Pol, NiMH/NiCd, lead acid	0	0%	
<b>Linear charger with power manager</b>	10	100%						5 products are SBS 1.1 compliant Smart Chargers.
■ Standalone	10	100%	1.5	1	Li-Ion/Pol	10	100%	
■ Non-standalone	0	0%	—	—	—	0	0%	
<b>Total</b>	<b>64</b>	<b>100%</b>	<b>8</b>	<b>16</b>	<b>—</b>	<b>24</b>	<b>37%</b>	<b>—</b>

### Multifunction Charger ICs:

Battery charger IC type	Core products		Battery attributes			# of regulated outputs	Key trends
	#	%	Charge I <sub>max</sub> (A)	# series cells	Type		
<b>Linear topology</b>	6	100%	0.95	1	Li-Ion/Pol	1 to 2	2 products are USB 2.0 compliant
■ Standalone	6	100%		1	Li-Ion/Pol		
■ Non-standalone	0	0%		1	Li-Ion/Pol		
<b>Switching topology</b>	0	0%	—	1	Li-Ion/Pol		
■ Standalone	0	0%		1	Li-Ion/Pol		
■ Non-standalone	0	0%		1	Li-Ion/Pol		
<b>Linear charger with power manager</b>	9	100%	1.5	1	Li-Ion/Pol	2 to 5	6 products feature a switching power manager. 6 products are USB 2.0 compliant.
■ Standalone	9	100%		1	Li-Ion/Pol		
■ Non-standalone	0	0%		1	Li-Ion/Pol		
<b>Total</b>	<b>15</b>	<b>—</b>	<b>1.5</b>	<b>1</b>	<b>Li-Ion/Pol</b>	<b>1 to 5</b>	

In comparison, the start-up AnalogicTech offers only a single function standalone charger ICs targeted at mass market applications featuring a single cell Li-Ion/Pol battery and USB 2.0 compliant power source.

Battery charger IC type	Core products		Battery attributes			USB 2.0 compliant		Key trends
	#	%	Charge I <sub>max</sub> (A)	# series cells	Type	#	%	
<b>Linear topology</b>	22	100%						
■ Standalone	22	100%	2	1	Li-Ion/Pol	22	100%	
■ Non-standalone	0	0%	—	—	—	—	—	
<b>Switching topology</b>	1	100%						Switching/linear hybrid topology
■ Standalone	1	100%	2	1	Li-Ion/Pol	0	0%	
■ Non-standalone	0	0%	—	—	—	—	—	
<b>Total</b>	<b>23</b>	<b>100%</b>	<b>2</b>	<b>1</b>	<b>Li-Ion/Pol</b>	<b>22</b>	<b>96%</b>	<b>—</b>

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### TABLE of CONTENTS (106 pages, 62 figures)

- 1 INTRODUCTION**
- 2 KEY FINDINGS**
- 3 BATTERY MANGEMENT LANDSCAPE TRENDS**
  - 3.1 End-Equipment System Trends
  - 3.2 Battery Technology Trends
  - 3.3 Battery Charging Trends
  - 3.4 Industrial Design and Marketing Trends
- 4 BATTERY MANAGEMENT ARCHITECTURES and IC TYPES**
  - 4.1 Battery Management Architectures
  - 4.2 Battery Charger ICs
  - 4.3 Fuel Gauge ICs
  - 4.4 Protection ICs
  - 4.5 Authentication ICs
- 5 BATTERY MANAGEMENT IC SEGMENTATION**
  - 5.1 Product Segmentation by End-Equipment Power Levels
  - 5.2 Charger IC Product Segmentation
  - 5.3 Fuel Gauge IC Product Segmentation
  - 5.4 Protection IC Product Segmentation
- 6 BATTERY MANAGEMENT IC IMPLEMENTATION TRENDS**
  - 6.1 Functional Integration
  - 6.2 Process Technologies
- 7 BATTERY PACK IMPLEMENTATION TRENDS**
  - 7.1 Single Cell and Multicell Batteries
  - 7.2 Li-Ion/Polymer and Multi Chemistries
  - 7.3 Battery Pack IC Integration Trends
  - 7.4 Smart Battery Standards and Implementations
- 8 MARKET SIZE, GROWTH, and TRENDS (units and revenues, 2009-2014)**
  - 8.1 Market Segments by End-Equipment Type
  - 8.2 Standalone Charger and Fuel Gauge ICs by End-Equipment Type
  - 8.3 IC Vendors Market Share (2009) for Charger and Fuel Gauge ICs
- 9 EMERGING BATTERY MANAGEMENT APPLICATIONS**
  - 9.1 Energy Harvesting
  - 9.2 Electric Vehicles
- 10 IC VENDOR ANALYSES**
  - 10.1 Texas Instruments
  - 10.2 Linear Technology

- 10.3 Maxim Integrated Products
- 10.4 Intersil
- 10.5 Microchip Technology
- 10.6 AnalogicTech
- 10.7 Semtech
- 10.8 Summit Microelectronics
- 10.9 Renesas Electronics
- 10.10 Freescale Semiconductor
- 10.11 STMicroelectronics
- 10.12 Atmel
- 10.13 Richtek Technology
- 10.14 National Semiconductor
- 10.15 Analog Devices
- 10.16 Fujitsu Semiconductor
- 10.17 Rohm Semiconductor
- 10.18 ST-Ericsson
- 10.19 Broadcom
- 10.20 Qualcomm

## **APPENDIX – Analog ICs Market View**

- 1 Analog IC Definition
- 2 Analog ICs Segmentation
- 3 General-Purpose Category
- 4 Application-Specific Category
- 5 Analog ICs Market Data (2008 to 2010)
- 6 Power ICs Market Data (2008 to 2010)

## **LIST of FIGURES**

- 1 Battery Management Landscape Trends—Portable Devices
- 2 Power System Design Flow vs. Market/Product Segmentation
- 3 Battery Management ICs and Architecture
- 4 USB Compliant One-Cell Li-Ion/Pol Charger IC (TI's BQ24180)
- 5 In-System Fuel Gauge for Smart Phone System (TI's BQ27505)
- 6 Smart Battery System (SBS) Architecture
- 7 Battery Management IC Types
- 8 Battery Charger IC vs. End-Equipment Systems—The Big Picture
- 9 USB Connector Based Battery Charging
- 10 Battery Charger IC Functionality—The Big Picture
- 11 Battery Charger IC Implementation Domains
- 12 Switching Standalone Li-Ion/Pol Charger IC (TI's BQ241xx family)
- 13 Switching Host-Based LI-Ion/Pol Charger IC (TI's BQ24753)
- 14 Standalone Single-Cell Li-Ion/Pol Battery Fuel Gauge IC for Portable Applications (TI's BQ27101)
- 15 SBS 1.1 Compliant Fuel Gauge and Protection-Enabled IC (TI's BQ20z75-V180)
- 16 One-Wire Battery Monitoring IC for Mobile Phone and PDA Applications (TI's BQ2023)
- 17 Future battery Management Architecture for Single-Cell Li-Ion/Pol Applications
- 17 Standalone Fuel Gauge IC for In-System Applications (TI's BQ27500)
- 18 Voltage Protection IC fro Multicell LI-Ion/Pol Batteries (TI's BQ29400)

19	Battery Protection AFE for Multicell LI-Ion/Pol batteries (TI's BQ29312A)
20	Charger Front-End Protection IC for Li-Ion/Pol Batteries (TI's BQ24308)
21	Battery Pack Security and Authentication IC for Portable Applications (TI's BQ26150)
22	Charger ICs Product Classification Tree
23	Charger ICs Product Classification Methodology
24	Charging Algorithm (Intelligence) Implementation Trends
25	Fuel Gauge ICs Product Classification Tree
26	Overview of Battery Management ICs for Portable Devices Using LI-Ion/Pol Batteries
27	Charger IC Implementation Trends
28	Fuel Gauge IC Implementation Trends
29	LI-Ion/Pol Battery Pack Implementation Trends
30	End-Equipment Segmentation
31	End-market vs. Product Segmentation
32	Standalone Charger and Fuel Gauge ICs by Li-Ion/Pol Battery-Powered End-Equipment Type
33	Battery Charger and Fuel Gauge ICs Vendor Market Share
34	Battery Management ICs—Top Level Overview by Vendor
35	Single Function Linear Charger ICs—Major Product Categories by Vendor
36	Single Function Switching Charger ICs—Major Product Categories by Vendor
37	Multifunction Charger ICs—Major Product Categories by Vendor
38	Standalone Fuel Gauge ICs—Major Product Attributes by Vendor
39	Monitor ICs—Major Product Attributes by Vendor
40	Vendor Market Emphasis by End-Equipment Segment (Li-Ion/Pol Batteries)
41	Texas Instruments—Single Function Charger ICs Portfolio Attributes
42	Texas Instruments—Multifunction Charger ICs Product Portfolio
43	Texas Instruments—Fuel Gauge ICs Product Portfolio
44	Linear Technology—Single Function Charger ICs Portfolio Attributes
45	Linear Technology— Multifunction Charger ICs Portfolio Attributes
46	Maxim— Single Function Charger ICs Portfolio Attributes
47	Maxim—Fuel Gauge ICs Portfolio Attributes
48	Intersil—Single Function Charger ICs Portfolio Attributes
49	Microchip—Single Function Charger ICs Portfolio Attributes
50	AnalogicTech—Single Function Charger ICs Portfolio Attributes
51	Semtech—Single Function Charger IC Portfolio Attributes
52	Summit ME's Programmable Charger IC (SMB239)
53	Renesas' Integrated Protection and Monitor IC for Smart Battery Applications (M61044FP)
54	Freescale's PMIC Integrated Charger (MC13892)
55	STM's Integrated Battery Charger (L6924D)
56	Atmel's AVR Microcontroller Based Battery Management Products
57	Atmel's Smart Battery Management IC (ATmega406)
58	Richtek's Low Cost Li-Ion/Pol Battery Charger IC (RT9505)
59	Richtek's Charger Front-End Protection IC (RT9709)
60	National's PMIC Based Battery Charger IC (LP3821)
61	Rohm's PMIC with an Integrated Charger (BH7280GUW)
62	Rohm's Charger Front-End Protection IC (BD6040GUL)

## Appendix

A1	Analog ICs Market Trends (WSTS, PG)
A2	Power ICs Market View (PG)