

# Mobile Audio IC Industry Report, 2007-2008

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## Abstracts

Mobile audio IC is mainly applied to mobile phone and MP3 players and now it is extended to game console, hand-held navigation, digital camera and other fields. However, application in these fields is still small, compared to that in mobile phone and MP3 players. Mobile phone audio IC is divided into three categories, namely melody IC, CODEC, and audio amplifier IC. The audio IC of MP3 players mainly adopts MP3 decoder IC and CODEC.

Melody IC market prospects are bleak. Key global mobile phone manufacturers, like Nokia, Motorola, Sony-Ericsson and Siemens, seldom adopt melody IC. Especially since 2005, the four big producers have generally used application processor and customized analog baseband to replace melody IC. In early stage, mainly Japanese mobile phone producers, Samsung, LG and Chinese handset producers adopted melody IC chips. Nowadays, only Japanese manufacturers still insist on adopting melody IC, and the rest all have given it up.

There are only a small number of audio CODEC manufacturers, mainly TI, AKM and Wolfson Microelectronics. Audio CODEC market entry threshold is very high, and only the manufacturers mastering DELTA-SIGMA conversion can win themselves a place in the field. What's more, audio CODEC is mostly applied to compressed music players, and especially a huge amount is used in MP3 and digital camera. To CODEC producers, mobile phone is only their sideline business, about which they don't care much, if they lose it. As for MP3 player, Wolfson is absolutely the market dominator, monopolizing the market. As for non-portable music players like CD player and professional acoustics equipment, ADI, AKM and Cirrus share the market. Wolfson is seldom involved in the high-quality audio market. These manufacturers are comparatively conservative, and they don't pay much attention to portable music players. However, Cirrus has aggressively entered the field recently, claiming that it has beat Wolfson and would have its audio CODEC applied in the next generation of Apple

iPods.

With a large amount of high-quality audio mobile phones put into the market, more and more mobile phones have started adopting CODEC. Nokia has cooperated with TI all the time, so all of its audio CODEC is provided by TI. AKM, a small subsidiary of Asahi Kasei Corp., a Japanese chemical giant, has behaved conservatively, so its market is only restricted in Japan and South Korea. Normally, Wolfson is the only choice to producers.

Nowadays, independent audio amplifier IC is more and more used in mobile phones, while it used to be entirely integrated into analog baseband in the past.

About 85% of Nokia's mobile phones use independent audio amplifier IC in 2008, while about 70% of Samsung handsets also do so. Motorola and Sony Ericsson seldom adopt independent audio amplifier IC. At present, audio amplifier applied in mobile phone has two development trends: headphone driver amplifier and loudspeaker driver amplifier, which are common configurations to Nokia handsets.

Class-D audio amplifier applied in handsets accounts for more than 50% of the market share, and it mainly has the following types, TPA2010D1, TPA2012D2, TPA2005D1, YDA144, YDA1454, TPA4411, TPA6310A2, and SAPA1D2. New mobile phones, especially Nokia's new handsets, apply a large amount of Class-D audio amplifiers, and use a pair of amplifiers, one is headphone driver and the other is loudspeaker driver.

## Contents

### **1. BRIEF INTRODUCTION OF MOBILE AUDIO IC**

- 1.1 Mobile Audio IC Market and Industry Overview
- 1.2 Mobile Industry
- 1.3 Melody IC
- 1.4 Mobile Phone CODEC
- 1.5 Global Music Phone Market
- 1.6 China's Music Phone Market

### **2. MOBILE PHONE AUDIO IC MANUFACTURERS**

- 2.1 Shanghai Fangtek Electronics Co., Ltd
- 2.2 Medeli Electronics Co., Ltd
- 2.3 YAMAHA
- 2.4 OKI
- 2.5 NEC
- 2.6 ROHM
- 2.7 Wolfson
- 2.8 AKM
- 2.9 TI
- 2.10 Vimicro International Corp (VIMC)
- 2.11 Windbond

### **3. MP3 PLAYER AUDIO IC MARKET**

- 3.1 Global Market
- 3.2 China's Market
- 3.3 MP3 Player Chip Market and Industry

### **4. KEY MP3 DECODER CHIP MANUFACTURERS**

- 4.1 Actions Semiconductor Co., Ltd
- 4.2 Sigmatel
- 4.3 PortalPlayer
- 4.4 Telechips
- 4.5 Fuzhou Rockchips Electronics Co., Ltd

- 4.6 AccFast Technology
- 4.7 T-Square Microelectronics
- 4.8 MosArt Semiconductor
- 4.9 Philip

## **5. MOBILE AUDIO AMPLIFIER IC**

- 5.1 Mobile Audio Amplifier IC Market
- 5.2 Mobile Audio Amplifier IC Industry
- 5.3 Class-D Mobile Audio Amplifier
- 5.4 Shortcomings of and Solutions to Class-D Mobile Audio Amplifier
- 5.5 Applications of Mobile Phone Mobile Audio Amplifier IC

## **6. MOBILE AUDIO AMPLIFIER IC MANUFACTURERS**

- 6.1 YAMAHA
- 6.2 TI
- 6.3 National Semiconductor
- 6.4 Maxim
- 6.5 Onsemi
- 6.6 Analog Devices

## Tables

### TABLES/FIGURES

Statistics and Forecast of Global Mobile Phone Shipment, 2005-2011  
Market Shares of Key Global Mobile Phone Manufacturers, 2007  
Block Diagram of YAMAHA YMU765  
Statistics and Forecast of Global Melody IC Market Size, 2005-2010  
Market Shares of Key Global Melody IC Manufacturers, 2005  
Audio System of High-quality Audio Smart Phone  
Block Diagram of Wolfson WM8960  
Statistics and Forecast of Global MP3 Mobile Phone Shipment, 2004-2009  
Statistics & Forecast of Global Enhanced MP3 Handset Shipment, 2005-2009  
Statistics & Forecast of China MP3 & MP4 Mobile Phone Shipment, 2005-2010  
Statistics & Forecast of China MP3 Mobile Phone Shipment, 2005-2010  
Statistics & Forecast of China MP4 Mobile Phone Shipment, 2005-2010  
Product Route of Fangtek  
Basic Framework of Fangtek Products  
Block Diagram of FT1960N  
Revenue Structure of YAMAHA, 2008FY  
Profit Structure of YAMAHA, 2008FY  
Revenue & Profit of Electronic Components and Metal Products of YAMAHA, 2004FY-2008FY  
Block Diagram of YAMAHA YMU765  
Block Diagram of UPD9971  
Block Diagram of UPD9996  
Block Diagram of UPD9995  
Block Diagram of UPD9993  
Block Diagram of UPD9992  
Rohm Revenue Structure by Product, 2000-2008  
Rohm Revenue Structure by Region, 2000-2008  
Operation Profit Margin of Rohm, 2000-2008  
R & D Investment Structure of Rohm, 2004-2008  
Revenue and Operation Profit Margin of Wolfson, 2002-2007  
Quarterly Revenue of Wolfson, 1Q2006-4Q2007  
Operation Cost Structure of Wolfson, 2004-2007  
Wolfson's Product Downstream Application Structure, 2006  
Wolfson's Product Downstream Application Structure, 2007  
Cash Flow of Wolfson, 2004-2007

Wolfson Revenue Structure by Region, 2006-2007  
Wolfson Employee Structure, 1Q2005-4Q2007  
Gross Profit Margin and Cost Structure of Wolfson, 2002-2005  
Revenue Structure of Wolfson, 2005  
Block Diagram of AK4642  
Block Diagram of AK4645  
Revenue of TI by Product, 2007  
Mobile Phone Sales of TI, 2003-2007  
3G Mobile Phone Sales of TI, 2003-2007  
Portable Audio Convert Products of TI  
Block Diagram of TLV320AIC23  
Block Diagram of TLV320DAC23  
Revenue and Gross Profit Margin of VIMC, 2001-2007  
Revenue and Gross Profit Margin of Windbond, Q2 2006-Q1 2008  
Revenue and Gross Profit Margin of Windbond by Product, Q2 2006-Q1 2008  
Downstream Application Structure of Windbond's Products, Q4 2007 & Q1 2008  
Statistics and Forecast of Global MP3 Player Market Size and Shipment, 2005-2011  
Market Share of Key Global MP3 Manufacturers. 2007  
Apple IPOD Shipment, Q4 2006-Q1 2008  
Market Share of China's MP3 Market, Q1 2008  
Statistics and Forecast of Market Size of Portable Media Player Main Chip, 2004-2010  
Market Share of Key Portable Media Player Main Chip Manufacturers by Sales, 2005  
Revenue and Gross Profit Margin of Actions Semiconductor Co., Ltd, 2003-2007  
Structure of Related Companies to Actions Semiconductor  
Upstream and Downstream Partners of Actions Semiconductor  
Product Roadmap of Actions Semiconductor  
Product Field of Actions Semiconductor  
Key Products of Actions Semiconductor  
Block Diagram of ATJ2075  
Block Diagram of ATJ2085  
Block Diagram of ATJ2097  
Block Diagram of Actions 7500  
Functional Structure of Actions ATJ2135 System  
Revenue and Gross Profit Margin of Sigmatel, 2002-2007  
Revenue of Sigmatel by Region, 2005-2007  
Revenue of Sigmatel by Region, Q1 2006  
Roadmap of Sigmatel Audio CODEC  
Roadmap of Sigmatel PMP SoC  
Roadmap of Sigmatel Hard Decode Video SoC

Roadmap of Sigmatel Wireless Access Field  
Roadmap of Sigmatel TV & Audio Field  
Roadmap of Sigmatel Class-D Audio Amplifier Field  
Roadmap of Sigmatel of Digital Video Market  
Block Diagram of STMP3700  
Block Diagram of PP5024  
Block Diagram of PP5022  
Statistics and Forecast of Telechips Revenue and Net Profit Margin, 2003-2009  
Telechips Product Application Structure, Q1 2006-Q4 2007  
Telechips Product Application Structure, 2005-2010  
Telechips Client Structure, 2007  
Products of Telechips  
Block Diagram of TCC82XX  
Block Diagram of TCC83XX  
Block Diagram of TC7801  
Block Diagram of TCC79XX  
Block Diagram of SAA7750  
Forecast of Mobile Audio Amplifier IC Market Size, 2005-2010  
Forecast of Shipment of Enhanced Music Phone, 2005-2009  
Mobile Audio Amplifier IC Industry  
Market Shares of Key Global Mobile Audio Amplifier IC Manufacturers, 2005  
Efficiency Comparison between Class-D Audio Amplifier and Class-AB Audio Amplifier  
&Delta;-&Sigma; Modulator  
Typical Lowpass Circuit of Class-D Audio Amplifier  
Distribution of YAMAHA Class-D Amplifier Products  
Block Diagram of YAMAHA YDA131(D-1)  
Application Circuit Cases of YAMAHA YDA131(D-1)  
Comparison of Distorted Rate between YDA139 and Other Class-D Amplifier without Filter  
Comparison between YDA139 and Other Class-D Amplifier  
Quarterly Gross Profit Margin of National Semiconductor, Q4 2006FY-Q4 2—8 FY  
Quarterly Ratio of R&D of National Semiconductor, Q4 2006FY-Q4 2—8 FY  
Quarterly Ratio of Administrative Sales Management to Revenue of National Semiconductor, Q4 2006FY-Q4 2—8 FY  
Revenue of National Semiconductor by Product, 2007FY-2008FY  
Block Diagram of Onsemi NCP2820  
Block Diagram of NCP2821  
Block Diagram of SSM2302  
Sales of World's Top 14 Mobile Phone Manufacturers, 2007

Output of World's Top 15 Mobile Phone Manufacturers, 2007 (Unit: 1 million sets)  
Output, Sales and Baseband Provider of China's 40 Key Mobile Phone Manufacturers,  
2007-Q1 2008  
Mobile Phones with TI OAMP Application Processor  
Cases with Audio OCDEC  
Japan's Application Cases of YMU786  
Cases of YMU765  
OKI Audio Amplifiers and COEDC Products  
Some Mobile Phones with ROHM Audio Source Chip  
CODEC Products of Wolfson  
Mobile Phone Multimedia IC Products of VIMC  
Melody IC of Windbond  
Cost of IPOD Touch  
Cost of IPOD NANO  
Structure of Key Sigmatel Clients, 2005-2007  
Sigmatel Products in Audio Player Field  
MP3 Chips of MosArt Semiconductor  
Case of 100 Types of Mobile Phone Audio Amplifier IC  
Characteristics of Common Mobile Phone Class-AB Audio Amplifier IC  
Characteristics of Common Mobile Phone Class-D Audio Amplifier IC  
Company Profile of YAMAHA  
Class-D Amplifier Products of YAMAHA  
Class-D Amplifier Control IC of YAMAHA  
Characteristics Comparison between YAMAHA Class-D Amplifier and Other Class-D  
Amplifier  
Application of YAMAHA Class-D Amplifier Products  
Mobile Phone Class-AB Audio Amplifier Products of TI  
Mobile Phone Class-D Audio Amplifier Products of TI  
Portable Audio Amplifier Products Launched by National Semiconductor  
Mobile Phone Class-D Audio Amplifier Products of National Semiconductor  
Portable Audio Amplifier Products of Maxim  
Audio Amplifier Products of Onsemi  
Class-D Amplifier Products of Onsemi



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