

Analog

Gregg Lowe

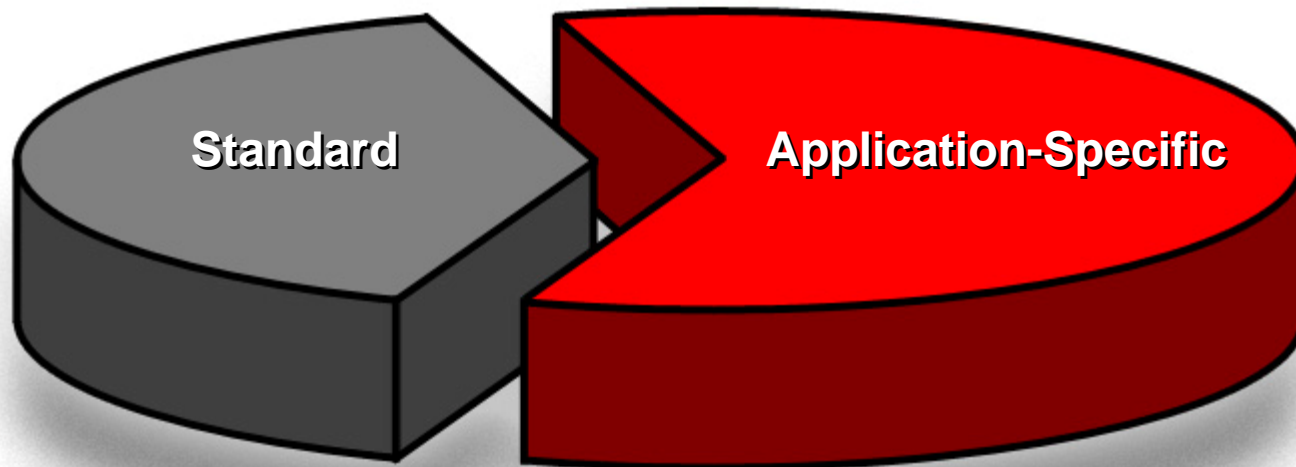
Senior vice president, Analog

Key topics

- Sustaining growth in high-performance analog (HPA)
- Accelerating growth in application-specific analog
- TI's unique capabilities to extend leadership in analog

The analog market is big

**Total Analog TAM 2007
\$36.5B**



Source: WSTS, 2008

Expanding leadership in analog

Analog Revenue \$M

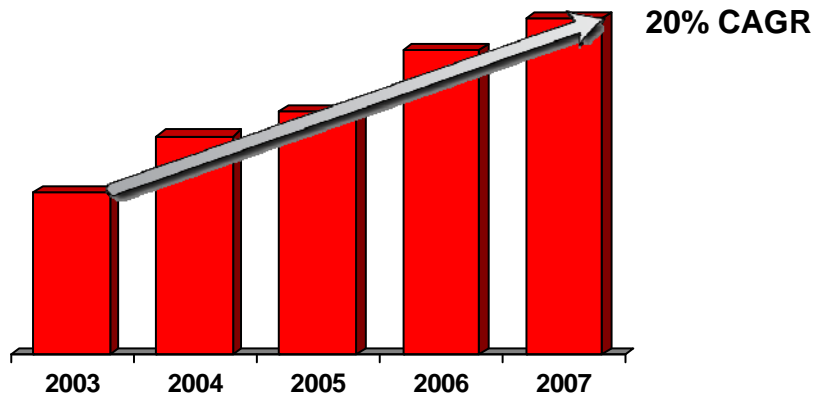
Company	2003	2004	2005	2006	2007
Texas Instruments	3,450	4,350	4,450	5,210	5,247
STMicroelectronics	3,414	4,166	4,215	3,327	3,844
Infineon Technologies	2,261	3,077	2,679	3,078	3,327
NXP	1,399	2,179	2,448	2,929	2,675
Analog Devices	1,760	1,988	1,728	1,878	2,221
National Semiconductor	1,410	1,731	1,726	1,837	1,703
Maxim Integrated Products	934	1,198	1,252	1,470	1,530
Freescale Semiconductor	776	1,358	1,054	1,534	1,245
Linear Technology	680	950	1,055	1,122	1,085
Renesas Technology	236	958	934	1,003	1,049

- Growing faster than market
- Significant opportunity remains – only ~13% market share
- Gains led by HPA

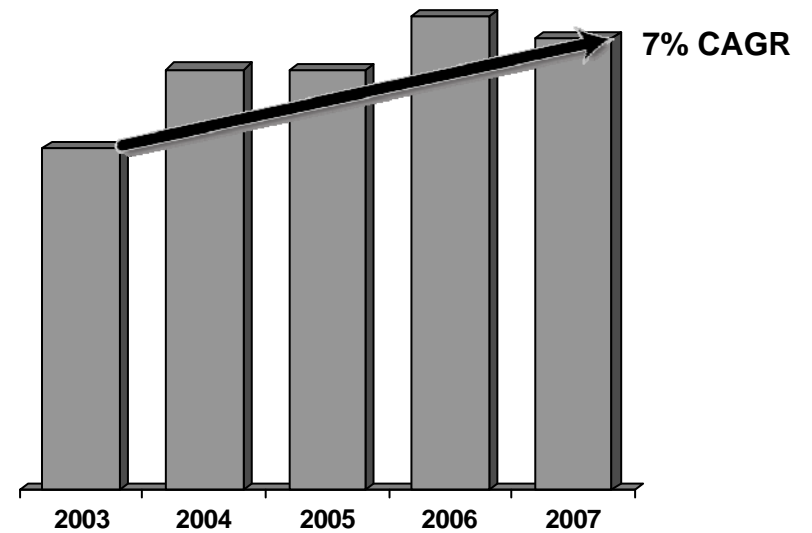
Source: Databeans, April 2008; WSTS

Analog gains led by HPA

TI HPA Revenue



TI Application-Specific Analog Revenue



Analog going forward: two growth drivers

- High-performance analog: reinforcing and accelerating the strategy to continue to outgrow the market
- Application-specific analog: making changes to inject growth

TI's engagement with customers is key to growth momentum



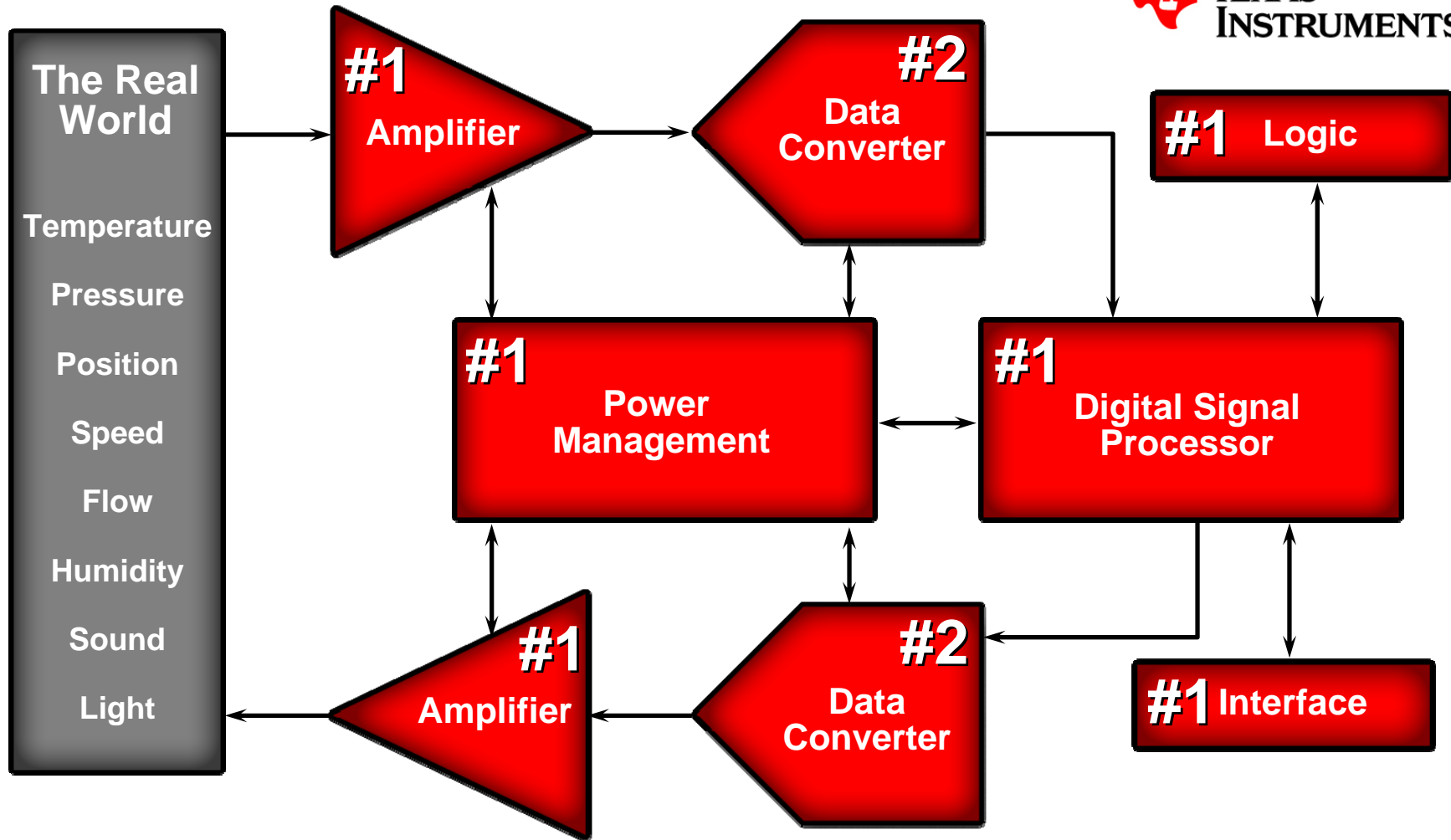
Making changes to drive growth in application-specific analog

- Create smaller, faster and more nimble product teams
 - Address more markets and customers
 - Faster time to market
- Win more chips per board with more complete solutions
 - Increase return for customers
 - Utilize our system block diagram advantage
- Add value to customers with end-equipment knowledge
 - Increase our system content
 - Improve R&D efficiencies
- Foster cross product-line initiatives – technology and business practices
 - Expand reuse, shortens time to market
 - Increase number of new products

New markets offer new growth

- Semiconductors key to end-product performance
- TI investments at multiple levels
 - Universities
 - Customers
 - Internal research
- Portfolio positions TI best to support spectrum of opportunities
 - Off-the-shelf HPA products for new, emerging programs
 - Optimized application-specific products for growing, high-volume programs

TI's system block diagram advantage



Source: Databeans, April 2008; Forward Concepts, February 2008



TI's system block diagram advantage

Is fundamental to:

- How we sell products to customers
- How we develop new customers
- How we create new products
- How we do business

Summary

- Stronger portfolio, bigger sales force, more customers continue to drive HPA success
- Making changes to accelerate growth in application-specific analog
- Block diagram advantage uniquely positions TI to extend leadership in analog