

GLOBAL

SWITCHING POWER SUPPLY INDUSTRY

(Low-Voltage Embedded Power Supplies)

(Detail-Version)

Strategies for A Changing Market

(09/25)

Micro-Tech Consultants

Global Switching Power Supply Industry 2025
Low-Voltage Embedded Power Supplies (Detail-Version)
Strategies for A Changing Market

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FOREWORD

This Global Switching Power Supply Industry 2025 Report provides a comprehensive analysis and forecast, based on these changed dynamics within the electronic equipment and the power supply industry. The forecast is based on analyzing data from hundreds of major OEMs and interviews from select companies. Two issues have dominated this year's market analysis: Tariffs and AI. Tariffs are supposed to dampen global markets, while AI is going to boost them. The analyses of the industry suggest AI is mainly responsible for the growth in the power supply industry. At the same time, due to tariffs, future remains uncertain.

Market analysis of battery chargers for electric vehicles has been excluded from this report as MTC concluded that it is a different industry than the Global Switching Power Supply Industry as defined in the report. As a result, data compilation and aggregation between two industries became difficult. Any inconvenience due to this change is regretted.

The analysis is provided at the "Global Level" because regional-level business transactions are indeterminate. The power supply business has become global, especially for multinational power supply manufacturers (PSMs) and their OEM customers. For example, power supply manufacturers can be designing power supplies in one region, like the Americas, manufacturing them in another region like the APAC and selling them in a third region like EMEA. This dynamic business transaction has blurred the market determination between different regions. In addition, the power supply industry also consists of many small companies that manufacture and sell their products in their "native or local regions." For them, the regional markets are more important than the global markets. So the report provides information on both types of markets for both types of companies.

Power supplies are a unique commodity with multiple user/marketing/sales parameters. So the power supply data can be organized in many different combinations of different parameters. This report has organized this data in the following manner:

- **Products: AC-DC & DC-DC (exclude battery chargers for EVs)**
- **Regions: Americas, EMEA, APAC & Rest of World (should not be used as a market)**
- **Markets: LED, CON, COE, NTE, IND, MED, TRN & MIL**
- **Applications: CON: Cell Phones...; COE: Servers...; NTE: Routers... etc.**
- **Output Power: 0-50W... or 0-150W... depending upon the product**
- **Product Types: Standard, modified-standard & custom**
- **Output Voltages: Less than 1.0VDC to 48VDC... (for DC-DC)**
- **Input Voltages: AC-DC: Universal input; DC-DC: 48VDC; 28VDC; 24VDC; 12VDC; 5VDC...**
- **Output Current: DC-DC: 5A; 10A; 20A; 30A; 40A; 50A...**
- **Product Design/Packaging: DC-DC: Isolated; non-isolated; VRMs...**
- **Packaging: AC-DC: 3x5; 5x7; 1U; 2U...**
- **Packaging: DC-DC: HB; QB; EB; SB...**

With all these combinations, it is impossible to provide market size and trends for all possible applications and all possible product categories. Micro-Tech Consultants (MTC) has provided data and analysis for the most commonly used and most significant categories. It has provided in-depth information about the Global Switching Power Supply Industry along with market statistics in major geographic regions:

- **Americas (AMER)**
- **Europe, Middle East & Africa (EMEA)**
- **Asia Pacific (APAC)**
- **Rest of World (ROW category is created to reconcile market numbers, not as a market segment)**

The report also includes:

- **An analysis of various markets: LEDs, consumer, information technology (IT) consisting of computers and networking and telecommunications including AI servers, industrial/instrumentation, medical, transportation sector and Military/Aerospace equipment in different geographic regions**
- **An analysis of emerging trends related to new architectures: DPA—Distributed Power Architecture: using isolated DC-DC converters and IBA—Intermediate Bus Architecture—using non-isolated converters**
- **Emerging Trends In: Global changes, power architectures and related products, product models business models and strategic trends**

This report is the culmination of more than 40 years of market research in the low-voltage OEM embedded power supply industry and is organized in the following chapters:

Chapter 1.0: Executive Summary - summarizes the entire report in a concise manner. It provides an overview with specific important industry highlights, trends, and strategies.

Chapter 2.0: Global Power Supply Industry Analysis - provides an analysis of the Global Power Supply Industry, which includes OEM power supplies, telecom power systems (energy systems), uninterruptible power supplies (UPSs) and high-voltage power supplies (HVPS).

Chapter 3.0: Global OEM Power Supply Market Analysis - presents detailed information about global markets and power products, what the important and emerging markets are, and what products will be suitable for these markets—their trends and characteristics. It also includes specific product applications.

Chapter 4.0: Americas (AMER): OEM Power Supply Market Analysis - provides an analysis of AC-DC switchers and DC-DC converters in the Americas market.

Chapter 5.0: EMEA: Europe, Middle East & Africa: OEM Power Supply Market Analysis - provides an analysis of AC-DC switchers and DC-DC converters in the EMEA market.

Chapter 6.0: APAC: Asia/Pacific: OEM Power Supply Market Analysis - provides an analysis of AC-DC switchers and DC-DC converters in the APAC market.

Chapter 7.0: Rest of World (ROW): OEM Power Supply Market Analysis - provides an analysis of the AC-DC switchers and DC-DC converters in the Rest of World (ROW) market. The sales numbers associated with this region are related to sampling error. They are not to be used for strategic planning.

Chapter 8.0: Product Analysis - provides an in-depth analysis of marketable product parameters and evolving standards in the industry.

Chapter 9.0: Competitive Analysis - analyzes major power supply companies.

Chapter 10.0: Appendix: Definitions and Explanations – provides information and explanations about various definitions used to prepare this report. It also includes an explanation of geographic regions. Organization and Methodology – provides information about the report's organization and the methodology.

Chapter 11.0: Micro-Tech Consultants (MTC) - provides background information on Micro-Tech Consultants.