

GLOBAL

SWITCHING POWER SUPPLY INDUSTRY

(Embedded Power Supplies)

(Detail-Version)

Strategies for A Changing Market

(08/19)

Micro-Tech Consultants

**Global Switching Power Supply Industry 2019
Embedded Power Supplies (Detail-Version)
Strategies for A Changing Market**

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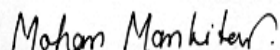
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FOREWORD

In the last four years (2015-2018), the global power supply industry experienced significant ups and downs beyond the normal peaks and valleys of a business cycle creating significant uncertainty. This uncertainty was the result of significant globalization (an event in one region creating a significant impact on the other region), emergence of: markets dynamics within mobile phones, tablets, laptop and desktop computers, new markets of drones, smart homes associated with Internet connected devices, LEDs, artificial intelligence (AI), machine learning (ML), 5G network deployment and battery chargers for electric vehicles, software/ service businesses (Google, Facebook, Twitter etc.). In addition, new paradigm in adapter markets has emerged, that they can be sold directly to end customers at higher prices. With increasing popularity of mobile devices, this additional profitable market is increasing. In summary, power supply market dynamics is changing from relatively flat or low growth established markets to high growth emerging markets. This new paradigm offers unique opportunities for power supply companies.

This Global Switching Power Supply Industry 2019 Report provides a comprehensive analysis of this changing dynamics within the power supply industry. It provides a quantitative measure and qualitative analysis. 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, PSMs can be designing power supplies in one region, like the Americas, manufacture them in another region like the APAC: China and sell them in a third region like EMEA. This dynamic business transaction has blurred the market determination between different regions. However, 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. In this report, EV battery charger market was analyzed more comprehensively and as a result market size was determined to be significantly higher than previously stated. To provide consistency to this segment the commercial aviation category has been moved from the military/aerospace to the transportation segment.

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**
- **Regions: Americas, EMEA, APAC & Rest of World**
- **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: 1.2VDC; 2.5VDC; 3.3VDC; 5.0VDC; 12VDC; 24VDC; 28VDC; 48VDC...**
- **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; 1/8th B; SIP...**

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.

- **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)**
- **An analysis of various markets: LEDs, consumer, information technology (IT) consisting of computers and networking and telecommunications, 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, and business models**

In addition to the market and product analysis, this report provides an in-depth analysis of the power supply business and strategic options.

This report is the culmination of more than 35 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 report's organization and the methodology.

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