

GLOBAL

SWITCHING POWER SUPPLY INDUSTRY

(Embedded Power Supplies)

(Standard-Version)

Strategies for A Changing Market

(08/19)

Micro-Tech Consultants

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

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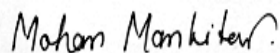
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CONTENTS

FOREWORD

1.0	EXECUTIVE SUMMARY	1-1
	Overview	
	The Market Definition.....	1-2
	The Power Supply Industry: Basics & Background.....	1-2
	The Power Supply Industry: Review of 2018	1-7
	Industry Trends.....	1-10
	Products & Markets.....	1-15
	AC-DC Switchers.....	1-16
	DC-DC Converters.....	1-18
	Merchant/Captive.....	1-21
	Distributed Power Architecture (DPA).....	1-26
	Market Segments.....	1-28
	Competitive Market Position.....	1-30
	Analysis of Worldwide Markets.....	1-34
	Americas: OEM Merchant Power Supplies.....	1-38
	EMEA: OEM Merchant Power Supplies.....	1-42
	APAC: OEM Merchant Power Supplies.....	1-46
	Rest of World: OEM Merchant Power Supplies.....	1-50
	Strategies.....	1-51
	MEAN WELL: A Unique Company.....	1-55
	The Power Supply Business in 2018	1-57
	The Power Supply Business Models.....	1-60
2.0	GLOBAL POWER SUPPLY INDUSTRY ANALYSIS.....	2-1
	Overview	
2.1	Global Power Supply Industry: An Overview.....	2-5
2.2	Summary of New Business Activity.....	2-11
3.0	GLOBAL EMBEDDED POWER SUPPLY MARKET ANALYSIS.....	3-1
	Overview	
3.1	Global: AC-DC Switcher Market Analysis.....	3-57
	Overview	
3.1.1	LED Lighting (LED).....	3-66
3.1.2	Consumer/Retail Equipment (CON).....	3-70
3.1.3	Computer/Office Equipment (COE).....	3-74
3.1.4	Networking/Telecom Equipment (NTE).....	3-78
3.1.5	Industrial/Instrumentation Equipment (IND).....	3-82
3.1.6	Medical Equipment (MED).....	3-86
3.1.7	Transportation (TRN).....	3-90
3.1.8	Military/Aerospace Equipment (MIL).....	3-94
3.2	Global: DC-DC Converter Market Analysis.....	3-98
	Overview	
3.2.1	LED Lighting (LED).....	3-116
3.2.2	Consumer/Retail Equipment (CON).....	3-120
3.2.3	Computer/Office Equipment (COE).....	3-124
3.2.4	Networking/Telecom Equipment (NTE).....	3-128
3.2.5	Industrial/Instrumentation Equipment (IND).....	3-132
3.2.6	Medical Equipment (MED).....	3-136
3.2.7	Transportation (TRN).....	3-140
3.2.8	Military/Aerospace Equipment (MIL).....	3-144

4.0	AMERICAS (AMER): NORTH, SOUTH & CENTRAL AMERICA EMBEDDED POWER SUPPLY MARKET ANALYSIS..... Overview	4-1
4.1	AMER: AC-DC Switcher Market Analysis.....	4-6
4.2	AMER: DC-DC Converter Market Analysis.....	4-26
5.0	EMEA: EUROPE, MIDDLE EAST & AFRICA EMBEDDED POWER SUPPLY MARKET ANALYSIS..... Overview	5-1
5.1	EMEA: AC-DC Switcher Market Analysis.....	5-6
5.2	EMEA: DC-DC Converter Market Analysis.....	5-26
6.0	ASIA/PACIFIC (APAC): EMBEDDED POWER SUPPLY MARKET ANALYSIS..... Overview	6-1
6.1	APAC: AC-DC Switcher Market Analysis.....	6-6
6.2	APAC: DC-DC Converter Market Analysis.....	6-26
7.0	REST OF THE WORLD (ROW): EMBEDDED POWER SUPPLY MARKET ANALYSIS..... Overview	7-1
7.1	ROW: AC-DC Switcher Market Analysis.....	7-5
7.2	ROW: DC-DC Converter Market Analysis.....	7-9
8.0	PRODUCT ANALYSIS..... Overview	8-1
8.1	AC-DC Switcher Trends.....	8-10
8.2	DC-DC Converter Trends.....	8-12
9.0	COMPETITIVE ANALYSIS..... Overview	9-1
9.1	AcBel Polytech Inc. (AcBel).....	9-12
9.2	Artesyn Embedded Power (Artesyn).....	9-14
9.3	AstrodyneTDI Corp. (AstrodyneTDI)	9-20
9.4	Bel Power Products (Bel).....	9-22
9.5	Calex Manufacturing Co. Inc. (Calex)	9-27
9.6	Chicony Power (Chicony)	9-29
9.7	CINCON Electronics (CINCON).....	9-31
9.8	Cosel, Inc. (Cosel).....	9-33
9.9	Crane Aerospace (Eldec, Interpoint, ST Keltec)	9-38
9.10	CUI, Inc.....	9-42
9.11	Delta Electronics, Inc. (Delta).....	9-47
9.12	Efore Plc.....	9-53
9.13	ERP Power LLC.....	9-57
9.14	Flex™ (FlexPower).....	9-60
9.15	FRIWO AG	9-64
9.16	FSP Group (FSP).....	9-67
9.17	Lite-On Technology Corporation. (Lite-On)	9-69
9.18	MEAN WELL ENTERPRISES Co. (MEAN WELL)	9-72
9.19	MORNSUN GUANGZHOU SCIENCE & TECHNOLOGY CO. LTD. (MORNSUN)	9-75
9.20	Murata (Murata Manufacturing & Murata Power Solutions)	9-77
9.21	N2Power, Inc.....	9-81
9.22	NetPower Technologies, Inc. (NetPower).....	9-83
9.23	Phihong Enterprises Ltd. (Phihong).....	9-85

9.24	Salcomp Oy (Salcomp).....	9-87
9.25	Sanken Power Systems (Sanken).....	9-90
9.26	SL Power Electronics (SL Power)	9-93
9.27	SynQor, Inc. (SynQor).....	9-98
9.28	TDK-Lambda Corporation (TDK-Lambda)	9-100
9.29	TT Electronics plc.	9-105
9.30	Vicor Corporation (Vicor).....	9-108
9.31	XP Power plc.....	9-116
10.0	APPENDIX.....	10-1
	Definitions & Explanations	
	Organization & Methodology	
11.0	Micro-Tech Consultants (MTC).....	11-1

LIST OF FIGURES/TABLES

1.0	EXECUTIVE SUMMARY.....	1-1
1.0.1	Global Consumption of OEM Switching Power Supplies.....	1-1
1.0.2	Global Consumption of AC-DC Switchers.....	1-16
1.0.3	Global Consumption of DC-DC Converters.....	1-18
1.0.4	Percentage of Global Consumption of Switching Power Supplies..... Merchant vs. Captive	1-22
1.0.5	Global Consumption of Switching Power Supplies..... Merchant & Captive	1-23
1.0.6	Global Consumption of Merchant Power Supplies..... AC-DC Switchers & DC-DC Converters	1-23
1.0.7	Global Consumption of Merchant AC-DC Switchers.....	1-24
1.0.8	Global Consumption of Merchant AC-DC Switchers..... EPS, FES & CPS	1-25
1.0.9	Global Consumption of Merchant Front-End Supplies (FES) and Rectifiers	1-25
1.0.10	Global Consumption of Merchant DC-DC Converters.....	1-26
1.0.11	Global Consumption of Merchant DPA.....	1-27
1.0.12	Global Consumption of Merchant DPA..... AC-DC/DC-DC Front-End & DC-DC Converters	1-27
1.0.13	Global Consumption of Merchant DPA..... AC-DC/DC-DC Front-End & DC-DC Converters (BUS Converters, Isolated Converters & Non-Isolated POLs)	1-28
1.0.14	Global Consumption of Switching Power Supplies:	1-29
	LED, CON, COE, NTE, IND, MED, TRN & MIL	
1.0.15	Global Consumption of Merchant Switching Power Supplies:	1-29
	LED, CON, COE, NTE, IND, MED, TRN & MIL	
1.0.16	Global Sales of Top 10 Merchant OEM Power Supply Companies..... 2018 Merchant Sales: AC-DC Switchers and DC-DC Converters	1-30
1.0.17	Market Share held by Top 10 Companies (from 2003 to 2018)	1-30
1.0.18	2018 Global Sales of Top 10 Merchant OEM AC-DC Switcher Companies.....	1-31
1.0.19	2018 Global Sales of Top 7 Merchant OEM DC-DC Converter Companies.....	1-31
1.0.20	Global Sales of Top 10 Merchant Power Supply Companies..... 2018 Sales: OEM PSs + TPSs + UPSs + RE INVs + HVPSs + Other	1-32
1.0.21	Number-One Power Supply Companies..... In Their Respective Products/Markets and Geographic Regions	1-32
1.0.22	Global Sales: Top 10 Merchant Power Supply Companies..... 2018 Sales: OEM + Telecom	1-33
1.0.23	Percentage of Global Switching Power Supplies in Different Geographic Regions..... Merchant Market: AC-DC Switchers & DC-DC Converters AMER vs. EMEA vs. APAC vs. ROW	1-34
1.0.24	Global Consumption of Switching Power Supplies in Different Geographic Regions.... AC-DC Switchers & DC-DC Converters	1-35
1.0.25	Global Consumption of Switching Power Supplies in Different Geographic Regions.... Merchant AC-DC Switchers & DC-DC Converters	1-35
1.0.26	Global Consumption of AC-DC Switchers in Different Geographic Regions.....	1-36
1.0.27	Global Consumption of Merchant AC-DC Switchers in Different Geographic Regions...	1-36
1.0.28	Global Consumption of DC-DC Converters in Different Geographic Regions.....	1-37
1.0.29	Global Consumption of Merchant DC-DC Converters in Different Geographic Regions.	1-37

1.0.30	Americas Consumption of Switching Power Supplies.....	1-39
1.0.31	Americas Consumption of Switching Power Supplies..... AC-DC Switchers & DC-DC Converters	1-40
1.0.32	Americas Consumption of Switching Power Supplies..... Merchant & Captive	1-40
1.0.33	Americas Consumption of Switching Power Supplies..... LED, CON, COE, NTE, IND, MED, TRN & MIL	1-40
1.0.34	Americas Consumption of Merchant Switching Power Supplies..... AC-DC Switchers & DC-DC Converters	1-41
1.0.35	Americas Consumption of Merchant Switching Power Supplies..... LED, CON, COE, NTE, IND, MED, TRN & MIL	1-41
1.0.36	EMEA Consumption of Switching Power Supplies.....	1-43
1.0.37	EMEA Consumption of Switching Power Supplies..... AC-DC Switchers & DC-DC Converters	1-43
1.0.38	EMEA Consumption of Switching Power Supplies..... Merchant & Captive	1-44
1.0.39	EMEA Consumption of Switching Power Supplies..... LED, CON, COE, NTE, IND, MED, TRN & MIL	1-44
1.0.40	EMEA Consumption of Merchant Switching Power Supplies..... AC-DC Switchers & DC-DC Converters	1-45
1.0.41	EMEA Consumption of Merchant Switching Power Supplies..... LED, CON, COE, NTE, IND, MED, TRN & MIL	1-45
1.0.42	APAC Consumption of Switching Power Supplies.....	1-47
1.0.43	APAC Consumption of Switching Power Supplies..... AC-DC Switchers & DC-DC Converters	1-48
1.0.44	APAC Consumption of Switching Power Supplies..... Merchant & Captive	1-48
1.0.45	APAC Consumption of Switching Power Supplies..... LED, CON, COE, NTE, IND, MED, TRN & MIL	1-48
1.0.46	APAC Consumption of Merchant Switching Power Supplies..... AC-DC Switchers & DC-DC Converters	1-49
1.0.47	APAC Consumption of Merchant Switching Power Supplies..... LED, CON, COE, NTE, IND, MED, TRN & MIL	1-49
1.0.48	Rest of World (ROW) Consumption of Switching Power Supplies.....	1-50
1.0.49	Rest of World (ROW) Consumption of Switching Power Supplies..... AC-DC Switchers & DC-DC Converters	1-50
1.0.50	Rest of World (ROW) Consumption of Switching Power Supplies..... Merchant & Captive	1-50
1.0.51	MEAN WELL's Revenue Growth Over Last Five Years.....	1-55
1.0.52	Financial Performance of Low-Voltage Power Supply Industry.....	1-57
1.0.53	Four-Year Trend in Gross Margin.....	1-58
1.0.54	Four-Year Trend in SG&A Expenses.....	1-58
1.0.55	Four-Year Trend in R&D Expenses.....	1-59
1.0.56	Four-Year Trend in Operating Income.....	1-59
1.0.57	Financial Model for High-Volume Custom AC-DC Switchers	1-60
1.0.58	Financial Model for Low-Volume Standard-Off-The-Shelf Power Supplies.....	1-61
1.0.59	Financial Model for High- & Low-Volume Standard & Custom Products..... AC-DC Switchers & DC-DC Converters	1-62

2.0	POWER SUPPLY INDUSTRY ANALYSIS..... OEM+TEL+UPS+HVPS	2-1
2.1	Global Power Supply Industry: An Overview.....	2-5
2.1.1	Global Consumption of Power Supplies..... OEM PSs, TPSs, UPSs & HVPSs	2-5
2.1.2	Global Consumption of Power Supplies..... OEM PSs, TPSs, UPSs & HVPSs	2-5
2.1.3	Global Consumption of Power Supplies of in Different Regions..... AMER, EMEA, APAC & ROW OEM PSs, TPSs, UPSs & HVPSs	2-6
2.1.4	Global Consumption of OEM Power Supplies (OEM PSs) in Different Regions..... AMER, EMEA, APAC & ROW	2-6
2.1.5	Global Consumption of Telecom Power Supplies (TPSs) in Different Regions..... AMER, EMEA, APAC & ROW	2-6
2.1.6	Global Consumption of Uninterruptible Power Supplies (UPSs) in Different Regions.... AMER, EMEA, APAC & ROW	2-6
2.1.7	Global Consumption of High Voltage Power Supplies (HVPSs) in Different Regions.... AMER, EMEA, APAC & ROW	2-7
2.1.8	Global Consumption of OEM + Telecom Power Supplies.....	2-7
2.1.9	Global Consumption of OEM + Telecom Power Supplies..... Merchant & Captive Consumption	2-7
2.1.10	Global Consumption of OEM + High Voltage Power Supplies.....	2-8
2.1.11	Global Consumption of OEM + High Voltage Power Supplies..... Merchant & Captive Consumption	2-8
2.1.12	Global Sales of Top Ten Merchant Power Supply Companies..... 2018 Sales: (OEM PSs + TPSs + UPSs + HVPSs)	2-9
2.1.13	Number-One Power Supply Companies..... In Their Respective Products/Markets and Geographic Regions	2-9
2.1.14	Global Sales of Top Ten Power Supplies Companies..... 2018 Sales: (OEM Power Supplies + Telecom Power)	2-10

3.0	GLOBAL (WW): OEM POWER SUPPLY MARKET ANALYSIS OVERVIEW	3-1
3.0.1	Market Share of Top 10 Power Supply Companies.....	3-4
3.0.2	Market Share of Top 7 Taiwan-based Companies.....	3-5
3.0.3	Global Consumption of Switching Power Supplies..... AC-DC Switchers & DC-DC Converters (2018-2023)	3-10
3.0.4	Global Consumption of Switching Power Supplies..... AC-DC Switchers & DC-DC Converters (2018-2023)	3-10
3.0.5	Global Consumption of Switching Power Supplies..... Merchant & Captive (2018-2023)	3-11
3.0.6	Global Consumption of Switching Power Supplies..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	3-12
3.0.7	Global Consumption of Switching Power Supplies..... STD, MSD & CST (2018-2023)	3-25
3.0.8	Global Consumption of Merchant Switching Power Supplies.....	3-26
3.0.9	Global Consumption of Merchant Switching Power Supplies..... AC-DC Switchers & DC-DC Converters (2018-2023)	3-27
3.0.10	Global Consumption of Merchant Switching Power Supplies..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	3-27
3.0.11	Global Consumption of Merchant Switching Power Supplies..... STD, MSD & CST (2018-2023)	3-27
3.0.12	Global Sales: Top 10 Merchant OEM Power Supply Companies..... 2018 Sales: AC-DC Switchers & DC-DC Converters	3-28
3.0.13	Global Consumption of Switching Power Supplies in Different Geographic Regions AC-DC Switchers & DC-DC Converters	3-31
3.0.14	Global Consumption of Switching Power Supplies in Different Geographic Regions Merchant AC-DC Switchers & DC-DC Converters	3-32
3.0.15	Global Consumption of AC-DC Switchers in Different Geographic Regions.....	3-32
3.0.16	Global Consumption of Merchant AC-DC Switchers in Different Geographic Regions...	3-32
3.0.17	Global Consumption of DC-DC Converters in Different Geographic Regions.....	3-33
3.0.18	Global Consumption of Merchant DC-DC Converters in Different Geographic Regions.	3-33

3.1	Global: AC-DC Switcher Market.....	3-34
3.1.1	Global Consumption of AC-DC Switchers..... (2018-2023)	3-35
3.1.2	Global Consumption of AC-DC Switchers..... Merchant & Captive (2018-2023)	3-35
3.1.3	Global Consumption of AC-DC Switchers..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	3-36
3.1.4	Global Consumption of AC-DC Switchers..... STD, MSD & CST (2018-2023)	3-36
3.1.5	Global Consumption of AC-DC Switchers..... Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-36
3.1.6	Global Consumption of Merchant AC-DC Switchers.....	3-37
3.1.7	Global Consumption of Merchant AC-DC Switchers..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	3-38
3.1.8	Global Consumption of Merchant AC-DC Switchers..... STD, MSD & CST (2018-2023)	3-38
3.1.9	Global Consumption of Merchant AC-DC Switchers..... Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-38
3.1.10	Global Consumption of Merchant AC-DC Switchers..... Adapters, Front Ends & Central Power System (2018-2023)	3-41
3.1.11	Global Consumption of Front-End Supplies (FES) and Rectifiers.....	3-41
3.1.12	Global Sales of Top 10 AC-DC Switcher Companies 2018 Merchant OEM AC-DC Switchers Sales	3-42

3.1.1	Global AC-DC Switcher Market..... LED: Lighting	3-43
3.1.1.1	Global Consumption of AC-DC Switchers..... LED: Lighting	3-43
3.1.1.2	Global Consumption of AC-DC Switchers..... LED: Merchant & Captive (2018-2023)	3-44
3.1.1.3	Global Consumption of AC-DC Switchers..... LED: STD, MSD & CST (2018-2023)	3-44
3.1.1.4	Global Consumption of AC-DC Switchers..... LED: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-44
3.1.1.5	Global Consumption of Merchant AC-DC Switchers..... LED: Lighting	3-45
3.1.1.6	Global Consumption of Merchant AC-DC Switchers..... LED: STD, MSD & CST (2018-2023)	3-45
3.1.1.7	Global Consumption of Merchant AC-DC Switchers..... LED: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-46
3.1.2	Global AC-DC Switcher Market..... CON: Consumer/Retail Equipment	3-47
3.1.2.1	Global Consumption of AC-DC Switchers..... CON: Consumer/Retail Equipment	3-47
3.1.2.2	Global Consumption of AC-DC Switchers..... CON: Merchant & Captive (2018-2023)	3-48
3.1.2.3	Global Consumption of AC-DC Switchers..... CON: STD, MSD & CST (2018-2023)	3-48
3.1.2.4	Global Consumption of AC-DC Switchers..... CON: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-48
3.1.2.5	Global Consumption of Merchant AC-DC Switchers..... CON: Consumer/Retail Equipment	3-49
3.1.2.6	Global Consumption of Merchant AC-DC Switchers..... CON: STD, MSD & CST (2018-2023)	3-49
3.1.2.7	Global Consumption of Merchant AC-DC Switchers..... CON: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-50

3.1.3	Global AC-DC Switcher Market..... COE: Computer/Office Equipment	3-51
3.1.3.1	Global Consumption of AC-DC Switchers..... COE: Computer/Office Equipment	3-51
3.1.3.2	Global Consumption of AC-DC Switchers..... COE: Merchant & Captive (2018-2023)	3-52
3.1.3.3	Global Consumption of AC-DC Switchers..... COE: STD, MSD & CST (2018-2023)	3-52
3.1.3.4	Global Consumption of AC-DC Switchers..... COE: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-52
3.1.3.5	Global Consumption of Merchant AC-DC Switchers..... COE: Computer/Office Equipment	3-53
3.1.3.6	Global Consumption of Merchant AC-DC Switchers..... COE: STD, MSD & CST (2018-2023)	3-53
3.1.3.7	Global Consumption of Merchant AC-DC Switchers..... COE: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-54
3.1.4	Global: AC-DC Switcher Market Analysis..... NTE: Networking/Telecom Equipment	3-55
3.1.4.1	Global Consumption of AC-DC Switchers..... NTE: Networking/Telecom Equipment	3-55
3.1.4.2	Global Consumption of AC-DC Switchers..... NTE: Merchant & Captive (2018-2023)	3-56
3.1.4.3	Global Consumption of AC-DC Switchers..... NTE: STD, MSD & CST (2018-2023)	3-56
3.1.4.4	Global Consumption of AC-DC Switchers..... NTE: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-56
3.1.4.5	Global Consumption of Merchant AC-DC Switchers..... NTE: Networking/Telecom Equipment	3-57
3.1.4.6	Global Consumption of Merchant AC-DC Switchers..... NTE: STD, MSD & CST (2018-2023)	3-57
3.1.4.7	Global Consumption of Merchant AC-DC Switchers..... NTE: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-58

3.1.5	Global: AC-DC Switcher Market Analysis..... IND: Industrial/Instrumentation Equipment	3-59
3.1.5.1	Global Consumption of AC-DC Switchers..... IND: Industrial/Instrumentation Equipment	3-59
3.1.5.2	Global Consumption of AC-DC Switchers..... IND: Merchant & Captive (2018-2023)	3-60
3.1.5.3	Global Consumption of AC-DC Switchers..... IND: STD, MSD & CST (2018-2023)	3-60
3.1.5.4	Global Consumption of AC-DC Switchers..... IND: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-60
3.1.5.5	Global Consumption of Merchant AC-DC Switchers..... IND: Industrial/Instrumentation Equipment	3-61
3.1.5.6	Global Consumption of Merchant AC-DC Switchers..... IND: STD, MSD & CST (2018-2023)	3-61
3.1.5.7	Global Consumption of Merchant AC-DC Switchers..... IND: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-62
3.1.6	Global: AC-DC Switcher Market Analysis..... MED: Medical Equipment	3-63
3.1.6.1	Global Consumption of AC-DC Switchers..... MED: Medical Equipment	3-63
3.1.6.2	Global Consumption of AC-DC Switchers..... MED: Merchant & Captive (2018-2023)	3-64
3.1.6.3	Global Consumption of AC-DC Switchers..... MED: STD, MSD & CST (2018-2023)	3-64
3.1.6.4	Global Consumption of AC-DC Switchers..... MED: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-64
3.1.6.5	Global Consumption of Merchant AC-DC Switchers..... MED: Medical Equipment	3-65
3.1.6.6	Global Consumption of Merchant AC-DC Switchers..... MED: STD, MSD & CST (2018-2023)	3-65
3.1.6.7	Global Consumption of Merchant AC-DC Switchers..... MED: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-66

3.1.7	Global: AC-DC Switcher Market Analysis..... TRN: Transportation	3-67
3.1.7.1	Global Consumption of AC-DC Switchers..... TRN: Transportation	3-67
3.1.7.2	Global Consumption of AC-DC Switchers..... TRN: Merchant & Captive (2018-2023)	3-68
3.1.7.3	Global Consumption of AC-DC Switchers..... TRN: STD, MSD & CST (2018-2023)	3-68
3.1.7.4	Global Consumption of AC-DC Switchers..... TRN: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-68
3.1.7.5	Global Consumption of Merchant AC-DC Switchers..... TRN: Transportation	3-69
3.1.7.6	Global Consumption of Merchant AC-DC Switchers..... TRN: STD, MSD & CST (2018-2023)	3-69
3.1.7.7	Global Consumption of Merchant AC-DC Switchers..... TRN: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-70
3.1.8	Global: AC-DC Switcher Market Analysis..... MIL: Military/Aerospace Equipment	3-71
3.1.8.1	Global Consumption of AC-DC Switchers..... MIL: Military/Aerospace Equipment	3-71
3.1.8.2	Global Consumption of AC-DC Switchers..... MIL: Merchant & Captive (2018-2023)	3-72
3.1.8.3	Global Consumption of AC-DC Switchers..... MIL: STD, MSD & CST (2018-2023)	3-72
3.1.8.4	Global Consumption of AC-DC Switchers..... MIL: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-72
3.1.8.5	Global Consumption of Merchant AC-DC Switchers..... MIL: Military/Aerospace Equipment	3-73
3.1.8.6	Global Consumption of Merchant AC-DC Switchers..... MIL: STD, MSD & CST (2018-2023)	3-73
3.1.8.7	Global Consumption of Merchant AC-DC Switchers..... MIL: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-74

3.2	Global: DC-DC Converters Market Analysis.....	3-75
3.2.1	Global Consumption of DC-DC Converters.....	3-78
3.2.2	Global Consumption of DC-DC Converters..... Merchant & Captive (2018-2023)	3-78
3.2.3	Global Consumption of DC-DC Converters..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	3-79
3.2.4	Global Consumption of DC-DC Converters..... STD, MSD & CST (2018-2023)	3-79
3.2.5	Global Consumption of DC-DC Converters..... Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-79
3.2.6	Global Consumption of Merchant DC-DC Converters..... (2018-2023)	3-80
3.2.7	Global Consumption of Merchant DC-DC Converters..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	3-81
3.2.8	Global Consumption of Merchant DC-DC Converters..... STD, MSD & CST (2018-2023)	3-81
3.2.9	Global Consumption of Merchant DC-DC Converters..... Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-81
3.2.10	Global Consumption of Merchant DC-DC Converters..... Board Mounted Converters & Box Type Converters (2018-2023)	3-82
3.2.11	Global Consumption of Merchant DC-DC Converters..... VRMs, Isolated Converters & Non-Isolated Converters (2018-2023)	3-82
3.2.12	Global Consumption of Merchant DPA..... (2018-2023)	3-83
3.2.13	Global Consumption of Merchant DPA..... AC-DC/DC-DC Front-End & Board Mounted DC-DC Converters (2018-2023)	3-84
3.2.14	Global Consumption of Merchant DPA..... AC-DC/DC-DC Front-End & Board Mounted DC-DC Converters (BUS Converters, Isolated Converters & Non-Isolated Converters-POLs) (2018-2023)	3-84
3.2.15	Global Sales of Top 7 DC-DC Converter Companies 2018 Merchant OEM DC-DC Converters Sales	3-84

3.2.1	Global: DC-DC Converters Market Analysis..... LED: Lighting	3-85
3.2.1.1	Global Consumption of DC-DC Converters..... LED: Lighting	3-85
3.2.1.2	Global Consumption of DC-DC Converters..... LED: Merchant & Captive (2018-2023)	3-86
3.2.1.3	Global Consumption of DC-DC Converters..... LED: STD, MSD & CST (2018-2023)	3-86
3.2.1.4	Global Consumption of DC-DC Converters..... LED: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-86
3.2.1.5	Global Consumption of Merchant DC-DC Converters..... LED: Lighting	3-87
3.2.1.6	Global Consumption of Merchant DC-DC Converters..... LED: STD, MSD & CST (2018-2023)	3-87
3.2.1.7	Global Consumption of Merchant DC-DC Converters..... LED: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-88
3.2.2	Global: DC-DC Converters Market Analysis..... CON: Consumer/Retail Equipment	3-89
3.2.2.1	Global Consumption of DC-DC Converters..... CON: Consumer/Retail Equipment	3-89
3.2.2.2	Global Consumption of DC-DC Converters..... CON: Merchant & Captive (2018-2023)	3-90
3.2.2.3	Global Consumption of DC-DC Converters..... CON: STD, MSD & CST (2018-2023)	3-90
3.2.2.4	Global Consumption of DC-DC Converters..... CON: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-90
3.2.2.5	Global Consumption of Merchant DC-DC Converters..... CON: Consumer/Retail Equipment	3-91
3.2.2.6	Global Consumption of Merchant DC-DC Converters..... CON: STD, MSD & CST (2018-2023)	3-91
3.2.2.7	Global Consumption of Merchant DC-DC Converters..... CON: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-92

3.2.3	Global: DC-DC Converters Market Analysis..... COE: Computer/Office Equipment	3-93
3.2.3.1	Global Consumption of DC-DC Converters..... COE: Computer/Office Equipment	3-93
3.2.3.2	Global Consumption of DC-DC Converters..... COE: Merchant & Captive (2018-2023)	3-94
3.2.3.3	Global Consumption of DC-DC Converters..... COE: STD, MSD & CST (2018-2023)	3-94
3.2.3.4	Global Consumption of DC-DC Converters..... COE: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-94
3.2.3.5	Global Consumption of Merchant DC-DC Converters..... COE: Computer/Office Equipment	3-95
3.2.3.6	Global Consumption of Merchant DC-DC Converters..... COE: STD, MSD & CST (2018-2023)	3-95
3.2.3.7	Global Consumption of Merchant DC-DC Converters..... COE: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-96
3.2.4	Global: DC-DC Converters Market Analysis..... NTE: Networking/Telecom Equipment	3-97
3.2.4.1	Global Consumption of DC-DC Converters..... NTE: Networking/Telecom Equipment	3-97
3.2.4.2	Global Consumption of DC-DC Converters..... NTE: Merchant & Captive (2018-2023)	3-98
3.2.4.3	Global Consumption of DC-DC Converters..... NTE: STD, MSD & CST (2018-2023)	3-98
3.2.4.4	Global Consumption of DC-DC Converters..... NTE: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-98
3.2.4.5	Global Consumption of Merchant DC-DC Converters..... NTE: Networking/Telecom Equipment	3-99
3.2.4.6	Global Consumption of Merchant DC-DC Converters..... NTE: STD, MSD & CST (2018-2023)	3-99
3.2.4.7	Global Consumption of Merchant DC-DC Converters..... NTE: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-100

3.2.5	Global: DC-DC Converter Market Analysis..... IND: Industrial/Instrumentation Equipment	3-101
3.2.5.1	Global Consumption of DC-DC Converters..... IND: Industrial/Instrumentation Equipment	3-101
3.2.5.2	Global Consumption of DC-DC Converters..... IND: Merchant & Captive (2018-2023)	3-102
3.2.5.3	Global Consumption of DC-DC Converters..... IND: STD, MSD & CST (2018-2023)	3-102
3.2.5.4	Global Consumption of DC-DC Converters..... IND: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-102
3.2.5.5	Global Consumption of Merchant DC-DC Converters..... IND: Industrial/Instrumentation Equipment	3-103
3.2.5.6	Global Consumption of Merchant DC-DC Converters..... IND: STD, MSD & CST (2018-2023)	3-103
3.2.5.7	Global Consumption of Merchant DC-DC Converters..... IND: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-104
3.2.6	Global: DC-DC Converter Market Analysis..... MED: Medical Equipment	3-105
3.2.6.1	Global Consumption of DC-DC Converters..... MED: Medical Equipment	3-105
3.2.6.2	Global Consumption of DC-DC Converters..... MED: Merchant & Captive (2018-2023)	3-106
3.2.6.3	Global Consumption of DC-DC Converters..... MED: STD, MSD & CST (2018-2023)	3-106
3.2.6.4	Global Consumption of DC-DC Converters..... MED: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-106
3.2.6.5	Global Consumption of Merchant DC-DC Converters..... MED: Medical Equipment	3-107
3.2.6.6	Global Consumption of Merchant DC-DC Converters..... MED: STD, MSD & CST (2018-2023)	3-107
3.2.6.7	Global Consumption of Merchant DC-DC Converters..... MED: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-108

3.2.7	Global: DC-DC Converter Market Analysis..... TRN: Transportation	3-109
3.2.7.1	Global Consumption of DC-DC Converters..... TRN: Transportation	3-109
3.2.7.2	Global Consumption of DC-DC Converters..... TRN: Merchant & Captive (2018-2023)	3-110
3.2.7.3	Global Consumption of DC-DC Converters..... TRN: STD, MSD & CST (2018-2023)	3-110
3.2.7.4	Global Consumption of DC-DC Converters..... TRN: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-110
3.2.7.5	Global Consumption of Merchant DC-DC Converters..... TRN: Transportation	3-111
3.2.7.6	Global Consumption of Merchant DC-DC Converters..... TRN: STD, MSD & CST (2018-2023)	3-111
3.2.7.7	Global Consumption of Merchant DC-DC Converters..... TRN: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-112
3.2.8	Global: DC-DC Converter Market Analysis..... MIL: Military/Aerospace Equipment	3-113
3.2.8.1	Global Consumption of DC-DC Converters..... MIL: Military/Aerospace Equipment	3-113
3.2.8.2	Global Consumption of DC-DC Converters..... MIL: Merchant & Captive (2018-2023)	3-114
3.2.8.3	Global Consumption of DC-DC Converters..... MIL: STD, MSD & CST (2018-2023)	3-114
3.2.8.4	Global Consumption of DC-DC Converters..... MIL: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-114
3.2.8.5	Global Consumption of Merchant DC-DC Converters..... MIL: Military/Aerospace Equipment	3-115
3.2.8.6	Global Consumption of Merchant DC-DC Converters..... MIL: STD, MSD & CST (2018-2023)	3-115
3.2.8.7	Global Consumption of Merchant DC-DC Converters..... MIL: Low, Low-Med, Med, Med-High & High Power (2018-2023)	3-116

4.0	AMERICAS (AMER) MARKET ANALYSIS..... OVERVIEW	4-1
4.0.1	Americas Consumption of Switching Power Supplies.....	4-2
4.0.2	Americas Consumption of Switching Power Supplies..... AC-DC Switchers & DC-DC Converters (2018-2023)	4-2
4.0.3	Americas Consumption of Switching Power Supplies..... Merchant & Captive (2018-2023)	4-3
4.0.4	Americas Consumption of Switching Power Supplies..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	4-3
4.0.5	Americas Consumption of Switching Power Supplies..... STD, MSD & CST (2018-2023)	4-3
4.0.6	Americas Consumption of Merchant Switching Power Supplies.....	4-4
4.0.7	Americas Consumption of Merchant Switching Power Supplies..... AC-DC Switchers & DC-DC Converters (2018-2023)	4-4
4.0.8	Americas Consumption of Merchant Switching Power Supplies..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	4-5
4.0.9	Americas Consumption of Merchant Switching Power Supplies..... STD, MSD & CST (2018-2023)	4-5
4.1.1	Americas Consumption of AC-DC Switchers (2018-2023)	4-6
4.1.2	Americas Consumption of AC-DC Switchers..... Merchant & Captive (2018-2023)	4-6
4.1.3	Americas Consumption of AC-DC Switchers..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	4-7
4.1.4	Americas Consumption of AC-DC Switchers..... STD, MSD & CST (2018-2023)	4-7
4.1.5	Americas Consumption of AC-DC Switchers..... Low, Low-Med, Med, Med-High & High Power (2018-2023)	4-7
4.1.6	Americas Consumption of Merchant AC-DC Switchers.....	4-8
4.1.7	Americas Consumption of Merchant AC-DC Switchers..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	4-8
4.1.8	Americas Consumption of Merchant AC-DC Switchers..... STD, MSD & CST (2018-2023)	4-9
4.1.9	Americas Consumption of Merchant AC-DC Switchers..... Low, Low-Med, Med, Med-High & High Power (2018-2023)	4-9
4.2	Americas: DC-DC Converter Market Analysis.....	4-10
4.2.1	Americas Consumption of DC-DC Converters.....	4-10
4.2.2	Americas Consumption of DC-DC Converters..... Merchant & Captive (2018-2023)	4-10
4.2.3	Americas Consumption of DC-DC Converters..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	4-11
4.2.4	Americas Consumption of DC-DC Converters..... STD, MSD & CST (2018-2023)	4-11
4.2.5	Americas Consumption of DC-DC Converters..... Low, Low-Med, Med, Med-High & High Power (2018-2023)	4-11
4.2.6	Americas Consumption of Merchant DC-DC Converters..... (2018-2023)	4-12
4.2.7	Americas Consumption of Merchant DC-DC Converters..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	4-12
4.2.8	Americas Consumption of Merchant DC-DC Converters..... STD, MSD & CST (2018-2023)	4-13
4.2.9	Americas Consumption of Merchant DC-DC Converters..... Low, Low-Med, Med, Med-High & High Power (2018-2023)	4-13

5.0	EMEA MARKET ANALYSIS..... OVERVIEW	5-1
5.0.1	EMEA Consumption of Switching Power Supplies.....	5-2
5.0.2	EMEA Consumption of Switching Power Supplies..... AC-DC Switchers & DC-DC Converters (2018-2023)	5-2
5.0.3	EMEA Consumption of Switching Power Supplies..... Merchant & Captive (2018-2023)	5-3
5.0.4	EMEA Consumption of Switching Power Supplies..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	5-3
5.0.5	EMEA Consumption of Switching Power Supplies..... STD, MSD & CST (2018-2023)	5-3
5.0.6	EMEA Consumption of Merchant Switching Power Supplies.....	5-2
5.0.7	EMEA Consumption of Merchant Switching Power Supplies..... AC-DC Switchers & DC-DC Converters (2018-2023)	5-4
5.0.8	EMEA Consumption of Merchant Switching Power Supplies..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	5-5
5.0.9	EMEA Consumption of Merchant Switching Power Supplies..... STD, MSD & CST (2018-2023)	5-5
5.1.1	EMEA Consumption of AC-DC Switchers (2018-2023)	5-6
5.1.2	EMEA Consumption of AC-DC Switchers..... Merchant & Captive (2018-2023)	5-6
5.1.3	EMEA Consumption of AC-DC Switchers..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	5-7
5.1.4	EMEA Consumption of AC-DC Switchers..... STD, MSD & CST (2018-2023)	5-7
5.1.5	EMEA Consumption of AC-DC Switchers..... Low, Low-Med, Med, Med-High & High Power (2018-2023)	5-7
5.1.6	EMEA Consumption of Merchant AC-DC Switchers.....	5-8
5.1.7	EMEA Consumption of Merchant AC-DC Switchers..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	5-8
5.1.8	EMEA Consumption of Merchant AC-DC Switchers..... STD, MSD & CST (2018-2023)	5-9
5.1.9	EMEA Consumption of Merchant AC-DC Switchers..... Low, Low-Med, Med, Med-High & High Power (2018-2023)	5-9
5.2	EMEA: DC-DC Converter Market Analysis.....	5-10
5.2.1	EMEA Consumption of DC-DC Converters.....	5-10
5.2.2	EMEA Consumption of DC-DC Converters..... Merchant & Captive (2018-2023)	5-10
5.2.3	EMEA Consumption of DC-DC Converters..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	5-11
5.2.4	EMEA Consumption of DC-DC Converters..... STD, MSD & CST (2018-2023)	5-11
5.2.5	EMEA Consumption of DC-DC Converters..... Low, Low-Med, Med, Med-High & High Power (2018-2023)	5-11
5.2.6	EMEA Consumption of Merchant DC-DC Converters..... (2018-2023)	5-12
5.2.7	EMEA Consumption of Merchant DC-DC Converters..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	5-12
5.2.8	EMEA Consumption of Merchant DC-DC Converters..... STD, MSD & CST (2018-2023)	5-13
5.2.9	EMEA Consumption of Merchant DC-DC Converters..... Low, Low-Med, Med, Med-High & High Power (2018-2023)	5-13

6.0	APAC MARKET ANALYSIS..... OVERVIEW	6-1
6.0.1	APAC Consumption of Switching Power Supplies.....	6-2
6.0.2	APAC Consumption of Switching Power Supplies..... AC-DC Switchers & DC-DC Converters (2018-2023)	6-2
6.0.3	APAC Consumption of Switching Power Supplies..... Merchant & Captive (2018-2023)	6-3
6.0.4	APAC Consumption of Switching Power Supplies..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	6-3
6.0.5	APAC Consumption of Switching Power Supplies..... STD, MSD & CST (2018-2023)	6-3
6.0.6	APAC Consumption of Merchant Switching Power Supplies.....	6-2
6.0.7	APAC Consumption of Merchant Switching Power Supplies..... AC-DC Switchers & DC-DC Converters (2018-2023)	6-4
6.0.8	APAC Consumption of Merchant Switching Power Supplies..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	6-5
6.0.9	APAC Consumption of Merchant Switching Power Supplies..... STD, MSD & CST (2018-2023)	6-5
6.1.1	APAC Consumption of AC-DC Switchers (2018-2023)	6-6
6.1.2	APAC Consumption of AC-DC Switchers..... Merchant & Captive (2018-2023)	6-6
6.1.3	APAC Consumption of AC-DC Switchers..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	6-7
6.1.4	APAC Consumption of AC-DC Switchers..... STD, MSD & CST (2018-2023)	6-7
6.1.5	APAC Consumption of AC-DC Switchers..... Low, Low-Med, Med, Med-High & High Power (2018-2023)	6-7
6.1.6	APAC Consumption of Merchant AC-DC Switchers.....	6-8
6.1.7	APAC Consumption of Merchant AC-DC Switchers..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	6-8
6.1.8	APAC Consumption of Merchant AC-DC Switchers..... STD, MSD & CST (2018-2023)	6-9
6.1.9	APAC Consumption of Merchant AC-DC Switchers..... Low, Low-Med, Med, Med-High & High Power (2018-2023)	6-9
6.2	APAC: DC-DC Converter Market Analysis.....	6-10
6.2.1	APAC Consumption of DC-DC Converters.....	6-10
6.2.2	APAC Consumption of DC-DC Converters..... Merchant & Captive (2018-2023)	6-10
6.2.3	APAC Consumption of DC-DC Converters..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	6-11
6.2.4	APAC Consumption of DC-DC Converters..... STD, MSD & CST (2018-2023)	6-11
6.2.5	APAC Consumption of DC-DC Converters..... Low, Low-Med, Med, Med-High & High Power (2018-2023)	6-11
6.2.6	APAC Consumption of Merchant DC-DC Converters..... (2018-2023)	6-12
6.2.7	APAC Consumption of Merchant DC-DC Converters..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	6-12
6.2.8	APAC Consumption of Merchant DC-DC Converters..... STD, MSD & CST (2018-2023)	6-13
6.2.9	APAC Consumption of Merchant DC-DC Converters..... Low, Low-Med, Med, Med-High & High Power (2018-2023)	6-13

7.0	ROW (REST OF THE WORLD) MARKET ANALYSIS..... OVERVIEW	7-1
7.0.1	ROW Consumption of Switching Power Supplies.....	7-1
7.0.2	ROW Consumption of Switching Power Supplies..... AC-DC Switchers & DC-DC Converters (2018-2023)	7-1
7.0.3	ROW Consumption of Switching Power Supplies..... Merchant & Captive (2018-2023)	7-1
7.0.4	ROW Consumption of Switching Power Supplies..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	7-2
7.0.5	ROW Consumption of Switching Power Supplies..... STD, MSD & CST (2018-2023)	7-2
7.0.6	ROW Consumption of Merchant Switching Power Supplies.....	7-3
7.0.7	ROW Consumption of Merchant Switching Power Supplies..... AC-DC Switchers & DC-DC Converters (2018-2023)	7-3
7.0.8	ROW Consumption of Merchant Switching Power Supplies..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	7-4
7.0.9	ROW Consumption of Merchant Switching Power Supplies..... STD, MSD & CST (2018-2023)	7-4
7.1	ROW Consumption of AC-DC Switcher Market Analysis.....	7-5
7.1.1	ROW Consumption of AC-DC Switchers (2018-2023)	7-5
7.1.2	ROW Consumption of AC-DC Switchers..... Merchant & Captive (2018-2023)	7-5
7.1.3	ROW Consumption of AC-DC Switchers..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	7-5
7.1.4	ROW Consumption of AC-DC Switchers..... STD, MSD & CST (2018-2023)	7-6
7.1.5	ROW Consumption of AC-DC Switchers..... Low, Low-Med, Med, Med-High & High Power (2018-2023)	7-6
7.1.6	ROW Consumption of Merchant AC-DC Switchers.....	7-7
7.1.7	ROW Consumption of Merchant AC-DC Switchers..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	7-7
7.1.8	ROW Consumption of Merchant AC-DC Switchers..... STD, MSD & CST (2018-2023)	7-8
7.1.9	ROW Consumption of Merchant AC-DC Switchers..... Low, Low-Med, Med, Med-High & High Power (2018-2023)	7-8
7.2	ROW: DC-DC Converter Market Analysis.....	7-9
7.2.1	ROW Consumption of DC-DC Converters.....	7-9
7.2.2	ROW Consumption of DC-DC Converters..... Merchant & Captive (2018-2023)	7-9
7.2.3	ROW Consumption of DC-DC Converters..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	7-9
7.2.4	ROW Consumption of DC-DC Converters..... STD, MSD & CST (2018-2023)	7-10
7.2.5	ROW Consumption of DC-DC Converters..... Low, Low-Med, Med, Med-High & High Power (2018-2023)	7-10
7.2.6	ROW Consumption of Merchant DC-DC Converters..... (2018-2023)	7-11
7.2.7	ROW Consumption of Merchant DC-DC Converters..... LED, CON, COE, NTE, IND, MED, TRN & MIL (2018-2023)	7-11
7.2.8	ROW Consumption of Merchant DC-DC Converters..... STD, MSD & CST (2018-2023)	7-12
7.2.9	ROW Consumption of Merchant DC-DC Converters..... Low, Low-Med, Med, Med-High & High Power (2018-2023)	7-12

8.0	PRODUCT ANALYSIS OVERVIEW	8-1
8.1	AC-DC Switcher Trends.....	8-10
8.1.1	Pricing Trends in AC-DC Switchers..... Dollars/Watt	8-10
8.1.2	EPA's 80PLUS Efficiency Guidelines & Certification	8-11
8.1.3	Power Density Range in Typical Multiple Output AC-DC Switchers (CPS)	8-11
8.1.4	Power Density Range in W AC-DC Switcher (FES)	8-11
8.2	DC-DC Converter Trends	8-12
8.2.1	Pricing Trends in DC-DC Converters..... Dollars/Watt	8-12
8.2.2	Pricing Trends in DC-DC Converters	8-12
8.2.3	DC-DC Converters: Output Voltage Trend	8-13

9.0	COMPETITIVE ANALYSIS OVERVIEW	9-1
9.0.1	Market Share Held by Top 10 Power Supply Companies	9-3
9.0.2	Global Sales of Top 10 Power Supply Companies	9-7
	2018 Sales: Merchant OEM Power Supplies	
9.0.3	Market Share of Top 7 Taiwan-based Power Supply Companies	9-8
9.0.4	MEAN WELL's Revenue Growth in Last Five Years	9-8
9.0.5	Global Sales: Top 10 AC-DC Switcher Companies	9-9
	2018 Sales: Merchant AC-DC Switchers	
9.0.6	Global Sales: Top 7 DC-DC Converter Companies	9-9
	2018 Sales: Merchant DC-DC Converters	
9.0.7	Global Merchant Switching Power Supply Companies	9-10
	2018 Sales: AC-DC Switchers & DC-DC Converters	

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**
- **Output Power: 0-50W... or 0-150W... depending upon the product**
- **Product Types; Standard, modified-standard & custom**

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.

Chapter 4.0: Americas (AMER): OEM Power Supply Market Analysis - provides a summary 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 a summary 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 a summary 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 a summary 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 a summary 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.