

MTC: Micro-Tech Consultants

Power Electronics Industry News Top-15 Power Supply Companies

TOP-15-PSM: 2020-SALES

Highlights:

TOP-15 PS
COMPANIES-
ALL TYPES:
OEM POWER+
TELECOM POWER+
UPSs+
INVERTERS+
OTHER PS

2

TOP-15 PS
COMPANIES:
OEM POWER+
TELECOM POWER

2

TOP-15 PS
COMPANIES:
OEM POWER

3

Number-One Power Supply Companies in their respective Products/Markets and Geographic Regions
CY: Calendar Year 2020 Sales: US Dollars in Millions

PS Companies	HQ Location	Products	Region	Sales
Delta Electronics	Taiwan	OEM+TEL+UPS+INV+OPS	WW	~\$5636
Delta Electronics	Taiwan	OEM+TELECOM	WW	~\$4638
Delta Electronics	Taiwan	OEM	WW	~\$3820
Delta Electronics	Taiwan	OEM: AC-DC	WW	~\$3637
Vicor	USA	OEM: DC-DC	WW	~\$240-260
Delta Electronics	Taiwan	TELECOM	WW	~\$818
Schneider Electric	France	UPS	WW	~\$3000-3500
Sungrow Power Supply	China	SOLAR INVERTERS	WW	~\$2715
Delta Electronics	Taiwan	OEM+TELECOM	AMER	~\$1178
Delta Electronics	Taiwan	OEM+TELECOM	EMEA	~\$816
Delta Electronics	Taiwan	OEM+TELECOM	APAC	~\$2444
Delta Electronics	Taiwan	OEM	AMER	~\$893
Delta Electronics	Taiwan	OEM	EMEA	~\$533
Delta Electronics	Taiwan	OEM	APAC	~\$2228
Delta Electronics	Taiwan	TELECOM	AMER	~\$285
Delta Electronics	Taiwan	TELECOM	EMEA	~\$283
Delta Electronics	Taiwan	TELECOM	APAC	~\$216

- OEM: Embedded power supplies incorporated in the system; DC output
- TELECOM Power: Outside power plant (Energy Systems/DC Power Systems): DC Output: includes rectifiers and other power supply related products including racks, enclosures, distribution panels, EF&I (Engineering, Furnishing & Installation), batteries and associated services
- UPS: Uninterruptible Power Supplies: AC output
- RE Inverters: Renewable Energy Inverters: AC output
- OPS: Other types of power supplies
- Prevailing exchange rates are used. Numbers are rounded to the nearest digit
- Further explanations are provided on Page 2 & 3
- Only accessible companies are listed; some companies sales may change due to change in reporting structure and exchange rate variations

MTC Commentary

**Top-16 Merchant PS Manufacturers
CY 2020 Worldwide Sales
All types of power supplies
OEM/Embedded (O) Power + Telecom (T) Power
+ UPSs (U) +RE Inverters (I) + Other Power
Supplies**

**Top-17 Merchant PS Manufacturers
CY 2020 Worldwide Sales
OEM/Embedded (O) Power + Telecom (T) Power**

No	PS Companies	Sales
1	Delta Electronics	~\$5636
2	Schneider Electric	~\$3000-3500
3	Sungrow Power Supply	~\$2715
4	Vertiv	~\$2000-2200
5	Lite-On	~\$1750
6	Eaton Corp.	~\$1600-\$1700
7	SolarEdge Technologies, Inc.	~\$1459
8	Advanced Energy	~\$1416
9	SMA Solar	~\$1250
10	Chicony Power	~\$1178
11	MEAN WELL	~\$1015
12	Flex™	~\$900-950
13	Enphase Energy	~\$744
14	Salcomp	~\$630-670
15	AcBel	~\$621
16	TDK-Lambda	~\$600

No	PS Companies	Sales
1	Delta Electronics	~\$4638
2	Lite-On	~\$1550-1600
3	Chicony Power	~\$1178
4	MEAN WELL	~\$1015
5	Flex™	~\$900-950
6	Advanced Energy	~\$685
7	Salcomp	~\$630-670
8	TDK-Lambda	~\$600
9	FSP Group	~\$546
10	AcBel	~\$513
11	ABB-EP	~\$475-510
12	Murata	~\$410-420
13	Tridonic	~\$390-420
14	Megmeet	~\$386
15	Phihong	~\$381
16	XP Power	~\$280-317
17	Vicor	~\$297

NOTE: Top-16 or Top-17 companies are listed instead of Top-15 because of their sales proximity.

- **OEM:** Embedded power supplies incorporated in the system; DC output
- **TELECOM Power:** Outside power plant (Energy Systems/DC Power Systems): DC Output: includes rectifiers and other power supply related products including racks, enclosures, distribution panels, EF&I (Engineering, Furnishing & Installation), batteries and associated services. Are provided on Page 3
- **UPS:** Uninterruptible Power Supplies: AC output
- **RE Inverters:** Renewable Energy Inverters: AC output
- **OPS:** Other types of power supplies
- Prevailing exchange rates are used. Numbers are rounded to the nearest digit
- Further explanations are provided on Page 3
- CY implies Calendar Year from 1/1/16 to 12/31/17, even though fiscal year (FY) may be different for different companies. MTC has computed all sales for the calendar year for uniformity and fairness
- Companies with identifiable power supply sales are only listed
- Only accessible companies are listed; some companies sales may change due to change in reporting structure and exchange rate variations

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MTC Commentary

Top-16 Merchant PS Manufacturers
CY 2020 Worldwide Sales
OEM/Embedded (O) Power

The Top-15 Power Supply Companies

No	PS Companies	Sales
1	Delta Electronics	~\$3820
2	Lite-On	~\$1550-1600
3	Chicony Power	~\$1178
4	MEAN WELL	~\$1015
5	Flex™	~\$900-950
6	Advanced Energy	~\$685
7	Salcomp	~\$630-670
8	TDK-Lambda	~\$600
9	FSP Group	~\$546
10	AcBel	~\$511
11	Murata	~\$410-420
12	Tridonic	~\$390-420
13	Phihong	~\$381
14	Megmeet	~\$353
15	XP Power	~\$280-317
16	Vicor	~\$297

The Top-15 Power Supply Manufacturers' list was prepared by using a combination of interviews, published data such as annual reports, management presentation and financial conferences and MTC's own estimates through various extrapolations of known benchmarks. The power supply industry consists of private companies and divisions of large companies for which power supply revenue numbers are not readily available. In such cases, experience, extrapolations and industry standard estimates have been used.

The list of "All Types of Power Supplies" consists of following power conversion products:

- OEM (embedded/internal + external power supplies)
- Telecom power (outside plant: equipment + services + directly replaced batteries, includes racks, power distribution panels and all ancillary products)
- UPSs include surge protectors and associated services
- Inverters and other power conversion products related to renewable energy
- Accessories/ancillary products and services related to power plants or power conversion
- Batteries used in conjunction with the power equipment

Note: The power supply companies' ranking is done by using information gathered from the reliable sources. In addition, MTC has estimated and extrapolated sales numbers from the public information and interviews. It is likely that a few merchant power supply companies with higher sales may not have been listed in the above groups. This is mainly due to the inaccessibility or the reliability of their data. Confidential information has not been used in the compilation of sales numbers. MTC has made every effort to gather sales numbers from public and reliable sources to include all the viable companies in the list.

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Disclaimer

The data collected in this report are from sources considered reliable and public. Estimates are used in case data are not available either through public domain or through interviews. No confidential information is used in the preparation of this report. Analysis, judgments and extrapolations used to derive certain conclusions are commensurate with normal/standard industry practices.

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Take The Micro-Tech Advantage:

- Focus on Power Supply/Electronics Industry
- More than 40 years of Power Supply/Electronics Industry Experience, Participation, Contacts & Background
- Obtains Marketing Information through exhaustive Primary Research
- Well respected in the Power Supply/Electronics Industry
- Publishes most Cost-Effective & Comprehensive Multi-Client Reports

MTC Products & Services:

- Global Switching Power Supply Industry Report (published annually)
- Custom Consulting: Acquisitions & Mergers

Micro-Tech Consultants (MTC) was founded in 1984 by Mohan Mankikar: MBA; MSCS; MEEE; BEEE

Its focus has been market research, analysis and consulting in the power supply industry. It produces an annual switching power supply industry report that includes AC-DC switchers and DC-DC converters. It provides consulting services to various clients that include merchant and captive power supply companies, power component manufacturers, electronic equipment manufacturers (OEMs) and financial institutions interested in investing in the power supply industry. In last twenty four years, Micro-Tech Consultants (MTC) has been the most recognized and widely quoted power supply market research company in the world. Its name and data have been used by many public companies and leading electronic trade publications.

Mr. Mankikar has over 40 years of experience in the power supply industry. He is the President of Micro-Tech Consultants (MTC), which provides market research and consulting services in the power supply industry. He was previously employed by Lambda Electronics, one of the largest standard power supply manufacturer and Gnostic Concepts, a leading technical market research/consulting organization of its time. Mr. Mankikar has given presentations and seminars at various organizations on the power supply industry. He wrote "Power Technologies" column for Electronic Engineering Times for twelve years. He published a widely-read "Power Electronics Industry Newsletter" for twenty four years.

MTC is an active member of PSMA

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