

Power Electronics Industry News

TOP-15-PSM: 2019-SALES

Highlights:

MTC Commentary 2
Top-15 PS Companies:
OEM+TELECOM
POER+UPSs+INVERTERS+OTHER PS

Top-15 PS Companies 2
OEM+TELECOM
POWER

Top-15 PS Companies 3
OEM POWER

Number-One Power Supply Companies in their respective Products/Markets and Geographic Regions
CY: Calendar Year 2019 Sales: US Dollars in Millions

PS Companies	HQ Location	Products	Region	Sales
Delta Electronics	Taiwan	OEM+TEL+UPS+INV+OPS	WW	~\$5308
Delta Electronics	Taiwan	OEM+TELECOM	WW	~\$4388
Delta Electronics	Taiwan	OEM	WW	~\$3491
Delta Electronics	Taiwan	OEM: AC-DC	WW	~\$3329
Vicor	USA	OEM: DC-DC	WW	~\$215-230
Delta Electronics	Taiwan	TELECOM	WW	~\$896
Schneider Electric	France	UPS	WW	~\$3000-3300
Sungrow Power Supply	China	SOLAR INVERTERS	WW	~\$1750-1950
Delta Electronics	Taiwan	OEM+TELECOM	AMER	~\$1001
Delta Electronics	Taiwan	OEM+TELECOM	EMEA	~\$763
Delta Electronics	Taiwan	OEM+TELECOM	APAC	~\$2394
Delta Electronics	Taiwan	OEM	AMER	~\$742
Delta Electronics	Taiwan	OEM	EMEA	~\$439
Delta Electronics	Taiwan	OEM	APAC	~\$2138
Delta Electronics	USA	TELECOM	AMER	~\$259
Delta Electronics	Taiwan	TELECOM	EMEA	~\$324
Delta Electronics	Taiwan	TELECOM	APAC	~\$256

- 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 2 & 3.

MTC Commentary

**Top-15 Merchant PS Manufacturers
CY 2019 Worldwide Sales**
All types of power supplies
OEM/Embedded (O) + Telecom (T) + UPS (U)
+RE Inverters (I) + Other PS

No	PS Companies	Sales
1	Delta Electronics	~\$5308
2	Schneider Electric	~\$3300-3500
3	Vertiv	~\$2000-2500
4	Eaton Corp.	~\$1850-2050
5	Sungrow Power Supply	~\$1750-1950
6	Lite-On	~\$1750
7	SolarEdge Technologies, Inc.	~\$1426
8	Chicony Power	~\$1133
9	SMA Solar	~\$1025
10	MEAN WELL	~\$1001
11	Flex™	~\$900-1000
12	Advanced Energy	~\$789
13	Enphase Energy	~\$624
14	TDK-Lambda	~\$600
14	AcBel	~\$600
15	Salcomp	~\$590

**Top-15 Merchant PS Manufacturers
CY 2019 Worldwide Sales**
OEM/Embedded (O) + Telecom (T)

No	PS Companies	Sales
1	Delta Electronics	~\$4388
2	Lite-On	~\$1550-1600
3	Chicony Power	~\$1133
4	MEAN WELL	~\$1001
5	Flex™	~\$850-875
6	Advanced Energy	~\$789
7	TDK-Lambda	~\$600
8	Salcomp	~\$590
9	AcBel	~\$531
10	ABB-EP *	~\$490-550
11	FSP Group	~\$502
12	Megmeet	~\$400
13	Phihong	~\$400
14	Murata	~\$360-380
15	Vicor	~\$263

- 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.

* ABB-EP is ABB Electrification Products. ABB sold its solar inverter business to FIMER S. p. A. of Italy.

>>>

MTC Commentary

Top-15 Merchant PS Manufacturers
CY 2019 Worldwide Sales
OEM/Embedded (O)

The Top-15 Power Supply Companies

No	PS Companies	Sales
1	Delta Electronics	~\$3491
2	Lite-On	~\$1550-1600
3	Chicony Power	~\$1133
4	MEAN WELL	~\$1001
5	Flex™	~\$850-875
6	Advanced Energy	~\$789
7	TDK-Lambda	~\$600
8	Salcomp	~\$590
9	AcBel	~\$528
10	FSP Group	~\$502
11	Megmeet	~\$400
12	Phihong	~\$400
12	Murata	~\$360-380
14	Vicor	~\$263
15	XP Power	~\$256

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 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

* Murata's CY 2019 sales

Note: The 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.

>>>

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.

Micro-Tech Consultants holds no responsibility for an unintentional error due to false or incorrect information but will make every possible effort to correct it.

The opinions and views expressed herein reflect the judgments of Micro-Tech Consultants and are subject to change.

Trademarks

All trademarks are the property of their respective owners.

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
- Strategic Planning
- Market Presentations/Seminars

Micro-Tech Consultants (MTC) is a member of PSMA