

# Power Electronics Industry News

Volume 189 March 2011

## Highlights:

Top-15 PS Companies 2  
Worldwide: All Types  
of Power Supplies

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**  
2010 Sales: US Dollars in Millions

PS Companies	HQ Location	Products	Region	Sales
Delta Electronics	Taiwan	OEM+TELECOM+UPS+INV	WW	~\$4267
Delta Electronics	Taiwan	OEM+TELECOM	WW	~\$3809
Delta Electronics	Taiwan	OEM	WW	~\$3355
Delta Electronics	Taiwan	OEM: AC-DC	WW	~\$3227
Murata	Japan	OEM: DC-DC	WW	~\$330
Emerson Network Power	USA	TELECOM	WW	~\$1050
Schneider Electric	France	UPS	WW	~\$3000
SMA Solar Technology AG	Germany	RE: INVERTERS (INV)	WW	~\$2500
Delta Electronics	Taiwan	OEM+TELECOM	NA	~\$1493
Delta Electronics	Taiwan	OEM+TELECOM	EU	~\$890
Delta Electronics	Taiwan	OEM+TELECOM	ASIA	~\$1343
Delta Electronics	Taiwan	OEM	NA	~\$1451
Delta Electronics	Taiwan	OEM	EU	~\$731
Delta Electronics	Taiwan	OEM	ASIA	~\$1114
Emerson Network Power	USA	TELECOM	NA	~\$350
Eltek Valere	Norway	TELECOM	EU	~\$261
Emerson Network Power	USA	TELECOM	ASIA	~\$400

OEM Power: Embedded power supplies incorporated in the system: DC Output  
TELECOM Power: Outside power plant (Energy Systems): DC Output: includes, EF&I, batteries used in conjunction with electronics, and other cabinet related services

UPS: Uninterruptible Power Supplies: AC Output  
RE Inverters: Renewable Energy Inverters: AC Output  
Prevailing exchange rates are used  
Numbers are rounded to the nearest digit  
Additional explanations are provided on Page 3.

**Top-15 Merchant PS Manufacturers****2010 Worldwide Sales****All types Power Supplies:****OEM/Embedded (O)+ Telecom (T)+ UPS (U) +  
RE Inverters (I) + Other**

No	PS Manufacturers O+T+U+I	WW Sales
1	Delta Electronics	~\$4267
2	Emerson Network Power	~\$3805
3	Schneider Electric	~\$3012
4	SMA Solar Technology AG	~\$2500
5	Eaton Corp. (Powerware)	~\$1850
6	Lite-On Technology	~\$1405
7	Power-One	~\$1047
8	Flextronics	~\$710
9	Chicony Power	~\$682
10	FSP Group	~\$677
11	Acbel	~\$665
12	Eltek Valere	~\$628
13	Murata	~\$612
14	TDK-Lambda	~\$600
15	Phihong	~\$542

**Top-15 Merchant PS Manufacturers****2010 Worldwide Sales****OEM/Embedded (O) + Telecom (T): DC Output:**

No	PS Manufacturers O+T	WW Sales
1	Delta Electronics	~\$3809
2	Emerson Network Power	~\$2525
3	Lite-On Technology	~\$1405
4	Flextronics	~\$710
5	Chicony Power	~\$682
6	FSP Group	~\$674
7	Acbel	~\$629
8	Eltek Valere	~\$628
9	Murata	~\$612
10	TDK-Lambda	~\$600
11	Phihong	~\$542
12	Lineage Power	~\$452
13	Salcomp	~\$400
14	Power-One	~\$332
15	Meanwell	~\$302

US dollars in millions

Prevailing exchange rates are used (1Euro = \$1.339 as of 12/31/10)

Other category includes other types of power supplies and power supply related products

Numbers are rounded to the nearest digit

All power supplies includes: OEM power, telecom power, UPSs, inverters, alternative energy conversion products and services related to all these products

Telecom power includes EF&amp;I, batteries used in conjunction with electronics and other cabinet related services

**Top-15 PS Manufacturers  
2010 Worldwide Sales  
OEM/Embedded Power: DC Output**

No	PS Manufacturers OEM/Embedded	WW Sales
1	Delta Electronics	~\$3355
2	Emerson Network Power	~\$1475
3	Lite-On Technology	~\$1405
4	Flextronics	~\$710
5	Chicony Power	~\$665
6	FSP Group	~\$659
7	Murata	~\$612
8	Acbel	~\$608
9	TDK-Lambda	~\$600
10	Phihong	~\$542
11	Salcomp	~\$400
12	Power-One	~\$332
13	Meanwell	~\$302
14	Sanken	~\$260
15	Vicor	~\$251

## The Top Power Supply Companies

The Top Power Supply Manufacturer's list was prepared by using a combination of extensive interviews, published data (annual reports; management presentations and financial conferences) and MTC's own estimates. 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 for "All Types of Power Supplies" consists of all power conversion products, including:

- OEM (embedded/internal + external power supplies),
- Telecom power (outside plant: equipment + services + directly replaced batteries),
- UPSs including all associated services and surge protectors,
- Inverters and other power conversion products related to alternative energy.
- Accessory/ancillary products and services related to power plants or power conversion
- Batteries used in conjunction with the power equipment

Companies with identifiable power supply sales are only listed.

Products are further segmented as OEM + Telecom (excluding UPSs & RE Inverters) and OEM Power, where a clear delineation of products is possible.

**Note: Ranking is done on the basis of information gathered and/or estimates created from the reliable sources. It is likely that a few merchant power supply manufacturers, who may fall into Top-15 categories were not listed because of the inaccessibility of their data. Their sales numbers could not be reliably obtained or verified. MTC makes every effort to gather such data to include such companies in the list. There are very few such power supply companies.**

**Forward-Looking Statement:**

Statements made by companies in this newsletter that are not historical fact are forward-looking statements, which involve risks and uncertainties that may cause actual results or events to differ materially from those expressed or implies in such statements.

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