

POWER SUPPLIES

Profile of the European Power Supplies Industry – Market Prospects to 2008

New Third Edition

After declining by over 40% between 2000 and 2002 the market for power supply equipment (UPS Equipment, DC Power Systems, Non-Captive DC-DC SMPS, Non-Captive AC-DC SMPS and External Power Supplies) in Western Europe bottomed out in 2003 with sales of Euro 3.51 billion (at 2002 exchange rates).

A modest recovery is expected in 2004 although the continuing loss of production to East Europe and Asia and the relentless reduction in prices will dampen growth. RER forecasts the market to reach Euro 4.2 billion by 2008, an average growth of 3.7%. Growth will vary by product group with the UPS market, which is not really affected by the production migration, showing the strongest growth at 4.7% pa.

The trend in the OEM power supply sector away from custom designed products to standard, modified standard and modular configurable products will continue throughout the forecast period.

The virtual collapse of the telecommunications market since 2000 has had a major impact on the power supplies industry. Declining sales combined with overcapacity has forced manufacturers to introduce restructuring programmes resulting in plant closures and increased outsourcing.

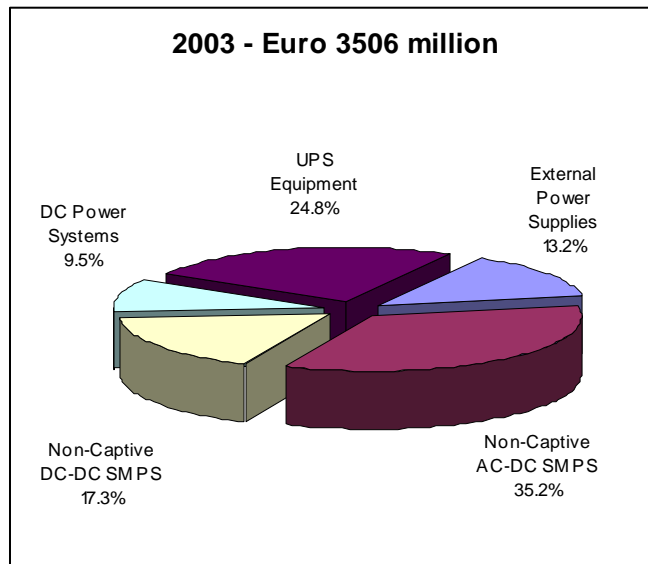
Industry consolidation, which has been prevalent

for the last five years, is expected to continue and has already resulted in the emergence of a number of larger players with US companies increasing their control of the European power supplies industry.

In 2002 four companies had power supply revenues of over Euro 300 million with US companies American Power Conversion and Emerson Network Power the leaders. A further four companies achieved sales of over Euro 100 million with the top ten accounting for approaching 65% of the market.

Notwithstanding the existence of a number of

major players in the OEM power supply market the industry in general remains fragmented with a large number of small companies concentrating on certain niches, either type and power range or OEM industry sector. Overall the report identifies over 270 companies with manufacturing facilities for power supply equipment in Europe.



Profile of the European Power Supplies Industry

reviews the non-captive power supply market in Western Europe, with analysis of industry structure, technology trends, geographical distribution and key players. Market data and forecasts to 2008 are included along with profiles of the leading 27 manufacturers of power supply equipment to the European market. The report will assist companies either directly involved as manufacturers or distributors, or indirectly such as outsourcing partners and suppliers of materials and components to the power supplies industry, in the formulation of accurate business and investment planning.

Strategic Market Assessment
Industry Structure & Analysis
In-depth Company Information
Five Year Market Forecasts

Full Report Now Available

See Inside for Details



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Profile of the European Power Supplies Industry

Report Methodology

The European Power Supplies Industry has been prepared by specialist research consultant Graham Weaver, and Reed Electronics Research's in-house research team. Graham Weaver, has over 30 years' experience in the electronics and related industries and has been principal consultant on all three editions of this report.

The report is a result of a programme of personal and telephone interviews with key manufacturers of power supplies, distributors and other industry experts, literature searches and research and analysis of statistical and other data obtained from official government sources, trade associations, company annual reports and various other sources.

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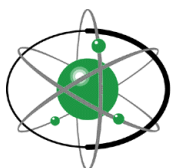
Information is presented in a variety of formats, all designed to assist senior management, marketing and business development personnel, industry watchers and analysts in keeping abreast of change, developments and other factors affecting their business.

RER publishes the annual **Yearbooks of World Electronics Data Series**, the standard industry reference to worldwide electronics production and market statistics based on primary research data, now in its 31th year. RER's research department also compiles the respected Profile series of market research reports, examining the diverse branches of the electronics and related industries in detail.

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Profile of the European Power Supplies Industry

Report Synopsis

Profile of the European Power Supplies Industry

reviews the markets, technological trends and major European manufacturers of power supplies, in the following categories:

- External power supplies – an AC/DC power supply that is located outside the equipment, usually in a wall plug-in or desktop style and also including mobile phone chargers.

- Non-captive switched mode AC/DC power supplies.

- Non-captive switched mode DC/DC power supplies (DC/DC converters).

- DC power systems.

- Uninterruptible power supplies (UPSs), excluding installation and service revenues.

Market data is provided for the period 2003 to 2008 and for the following countries/regions:

- Germany
- France
- UK
- Italy
- Nordic Countries
- Rest of West Europe

A strategic analysis of the top 27 power supply manufacturers in Europe is provided along with a breakdown of the industry's structure. This includes an extensive list of merger and acquisition activity over the last five years.

No of Pages: Approx 198

No of Tables/Figures: Approx 30

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(some 270 manufacturing locations including where available full address details, key executives, telephone and fax number, products, employees, sales)

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Profile of the European Power Supplies Industry Market Prospects to 2008

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