



U.S. Power Quality Market - Overview

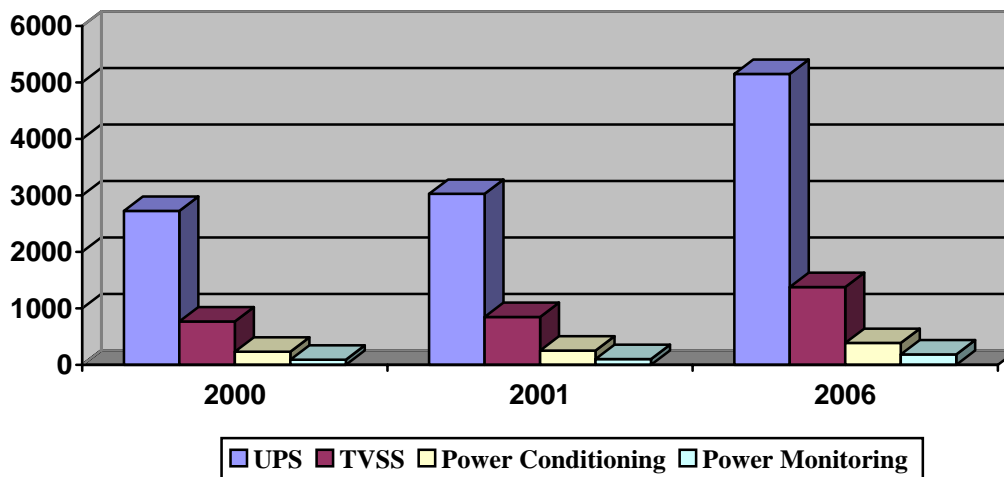
The overall market for power quality devices and services is robust, as it continues to grow at very healthy rate. Enterprise applications and large-facility markets such as data centers will see the most pronounced growth over the next few years. In addition, recent advances in power quality technology, such as breakthroughs in flywheel UPS design, will influence a dramatic push for market share of competing innovative technology. In the residential sector, the uncertainties posed by newly deregulated power markets will see increased demand for UPS equipment. Other power quality markets will see a small decline in growth rate corresponding to the slowdown in the PC and server market, and the corrective restructuring of the dot-com economy.

We estimate that the current U.S. annual market value of the major power quality related products groups is approximately \$3.8 billion. It is estimated that the overall market for power quality products and services will experience annual growth through 2006 of about 11%.

**Current and Projected U.S. Sales of Power Quality Devices
By Major Category, Through 2006**
(\$ Millions)

PQ Market Category	2000	2001e	2006e	AAGR% 2001-2006
UPS	2,724.3	3,027.1	5,150.1	11.2
TVSS	767.2	845.5	1,375.8	10.2
Power Conditioning	230.7	251.3	386.0	9.0
Power Monitoring	90.0	101.1	182.2	12.5
Total	3,812.2	4,225.0	7,094.1	10.9

**Current and Projected U.S. Sales of Power Quality Devices, By
Major Category (\$Millions)**





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