

MARKET DATA AND PRICE LEAD TIMES - Q1 / 2026

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| | | |
|-----------|---|--------|
| 266.98 | + | 7.43 |
| 1,579.06 | - | 4.02 |
| 10.05 | + | 0.23 |
| 6,172.49 | - | 278.90 |
| 28,437.70 | - | 35.56 |
| 12,169.24 | + | 175.08 |
| 37,985.44 | - | 77.14 |

/ EXECUTIVE SUMMARY

The global semiconductor market is entering a broader-based recovery, supported by improving demand across multiple end markets. Artificial intelligence continues to be a key catalyst, with inference increasingly shifting from the cloud to the edge. This transition is driving incremental content growth in analog, power management, sensors, and microcontrollers – broadening the opportunity beyond high-end compute. At the same time, demand from ADAS, AI-PCs, and edge devices is accelerating investment in advanced manufacturing, as the industry prepares for the next generation of process technologies focused on higher performance and improved power efficiency.

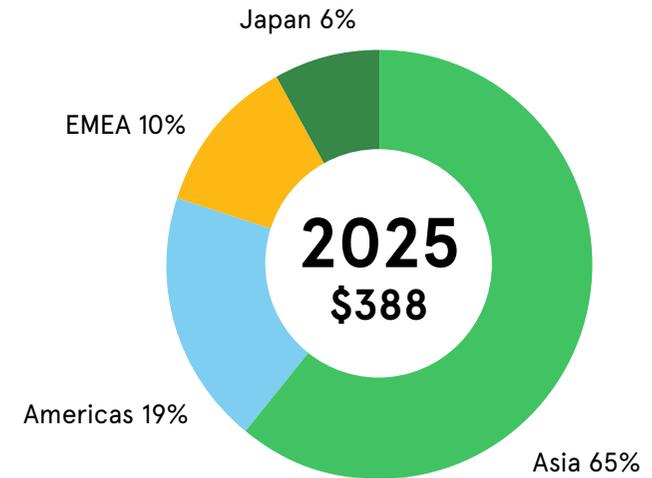
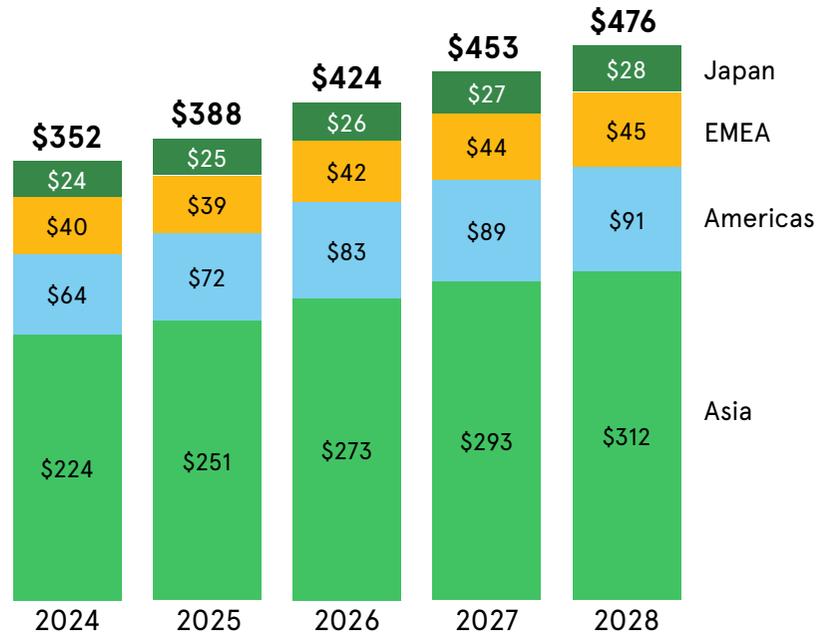
Macroeconomic conditions are also becoming more supportive. Expectations of easing interest rates and steady global growth are improving overall market sentiment, helping stabilise investment and planning across the semiconductor ecosystem.

In Europe, the manufacturing outlook softened toward year-end, with output and new orders losing momentum, particularly in export-driven segments. While cost pressures and cautious purchasing behavior remain, business confidence has improved, indicating that recent weakness may reflect year-end balance sheet adjustments rather than the start of a new downturn.

As always, this edition provides the latest **price and lead time overview**, helping you navigate current market conditions and plan strategically for the quarters ahead.

GLOBAL SEMI OUTLOOK BY REGION

(EXCLUDES DRAM, FLASH, MPU COMPUTE, GPU, AI PROCESSORS)



| Region | 2024 | 2025 | 2026 | 2027 | 2028 | 3-YR CAGR | 3-YR Growth |
|------------------|--------------|--------------|-------------|-------------|-------------|-------------|---------------|
| EMEA | -12.3% | -1.7% | 6.6% | 4.6% | 3.0% | 4.7% | \$5.8 |
| Asia | 0.2% | 12.2% | 8.8% | 7.3% | 6.4% | 7.5% | \$60.8 |
| Americas | -4.3% | 12.8% | 14.8% | 7.1% | 2.3% | 7.9% | \$18.6 |
| Japan | -17.0% | 1.7% | 3.3% | 5.0% | 4.2% | 4.2% | \$3.2 |
| Worldwide | -3.6% | 10.0% | 9.3% | 6.8% | 5.1% | 7.1% | \$88.5 |

Source: Avnet estimate based on industry data – Jan 2026 | Data based on end customer

/ 2026 GLOBAL OUTLOOK

- Market entering broad-based recovery: served-semi \uparrow 9.3% Y/Y to \$424B
- AI inference moves from the cloud to the edge, driving incremental content growth in Analog PMICs, Sensors, and MCUs rather than just high-end compute
- Demand from ADAS, AI-PCs, and Edge devices drives advanced chip growth – analysts project 14% CAGR in advanced fab capacity (<7nm) through 2028
- Manufacturers ramping 2nm mass production in 2H 2026; widespread adoption of Gate-All-Around (GAAFET) transistors to improve power efficiency by 30%
- CME projections point to U.S. rates falling, with the Fed Funds Rate normalising around 3.00–3.25% by year-end
- GDP growth at 3.0% for 2026
 - Major forecasters range from 2.6%–3.2%; United Nations, World Bank, IMF, etc.



Source: Avnet estimate based on industry data – Jan 2026 | Data based on end customer

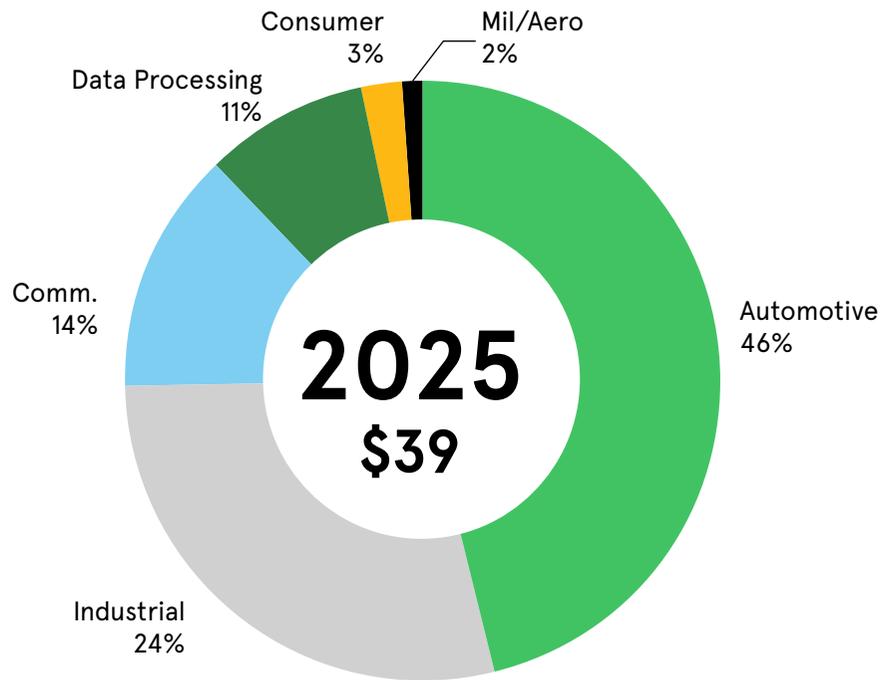
/ EUROPEAN MANUFACTURING PMI – SNAPSHOT

The Eurozone PMI ended the year on a soft note, with manufacturing losing momentum in December. Output fell for the first time since February 2025, pulling the Manufacturing PMI down to 48.8 from 49.6 in the previous month. The Output Index which had been the star for past months slipped to a 10-month low of 48.9. As is often the case, lack of new orders, and specifically export orders, are the culprit, declining at the fastest rate in almost a year. Manufacturers were reported to be discounting pricing, even while input prices have been increasing. They were also said to have continued to cut purchasing activity and inventories, even as they faced lengthening supplier lead times. Meanwhile the holidays did not slow reduction of staff this year. Looking at the portfolio of countries, Germany had disappointing numbers, joined by Italy and surprisingly Spain which has been the best performer all year. The other big surprise was France, having its strongest expansion since 2022. Despite the negative news, business optimism was said to be at its highest level since February 2022 (pre-Ukraine war), continuing on from November. Possibly what we saw in December is more about caution going into a new year and cleaning up balance sheets versus concern about another down year.

Source: Avnet estimate based on industry data – Jan 2026

EMEA SERVED SEMI VERTICAL MARKET GROWTH (\$B)

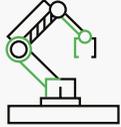
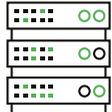
(EXCLUDES DRAM, FLASH, MPU COMPUTE, GPU, AI PROCESSORS)



| Vertical | 2025 |
|-----------------|------|
| Automotive | \$18 |
| Industrial | \$10 |
| Communication | \$6 |
| Data Processing | \$4 |
| Consumer | <\$1 |
| Mil/Aero | <\$1 |

Source: Avnet estimate based on industry data – Jan 2026 | Data based on end customer

TOP APPLICATION GROWTH EMEA

| Application | Vertical | 2025 | 2028 | Δ | 3-YR CAGR |
|--------------------------|--|-------|-------|-------|-----------|
| ADAS |  Automotive | \$4.4 | \$5.7 | \$1.4 | 9.7% |
| Electrified Powertrain | | \$3.4 | \$4.3 | \$0.9 | 8.4% |
| Automotive HPC | | \$1.4 | \$2.2 | \$0.8 | 15.8% |
| Transportation |  Industrial | \$2.0 | \$2.5 | \$0.5 | 7.3% |
| Agriculture | | \$0.6 | \$0.9 | \$0.3 | 13.9% |
| Medical/Healthcare | | \$1.3 | \$1.6 | \$0.3 | 6.4% |
| PCs |  Data Processing | \$1.8 | \$2.2 | \$0.4 | 7.1% |
| Servers | | \$0.8 | \$1.0 | \$0.2 | 8.7% |
| Smart Phones |  Communication | \$1.2 | \$1.6 | \$0.4 | 11.4% |
| Other Military/Aerospace |  Mil/Aero | \$0.5 | \$0.7 | \$0.2 | 11.3% |

Source: Avnet estimate based on industry data – Jan 2026 | Data based on end customer

PRICE & LEAD TIME OVERVIEW - DISCRETE

| Main packages | Diodes Inc | | Nexperia | | On Semiconductor | | STMicroelectronics | | Panjit | |
|-----------------------------|------------|----------|----------|----------|------------------|----------|--------------------|----------|--------|----------|
| | LT | LT trend | LT | LT trend | LT | LT trend | LT | LT trend | LT | LT trend |
| SOD80 | | | N/A* | N/A* | 16+ | = | | | 10 | = |
| SOD123 (F) | 9-16 | = | N/A* | N/A* | 16+ | = | 12-16 | = | 16 | + |
| SOD323 (F) | 26 | + | N/A* | N/A* | 16+ | = | 12-16 | = | 18 | + |
| SOD523 | 26 | + | N/A* | N/A* | 16+ | = | 12-16 | = | 16 | + |
| SOT23 | 26 | + | N/A* | N/A* | 16+ | = | 12-16 | = | 24 | + |
| SOT323 (SC70) | 26 | + | N/A* | N/A* | 16+ | = | 12-16 | = | 16 | + |
| SOT363 (SC88) | 9-16 | = | N/A* | N/A* | 16+ | = | | | 16 | + |
| SOT89 | 26 | + | N/A* | N/A* | 16+ | = | | | 16 | + |
| SOT223 | 9-16 | = | N/A* | N/A* | 16+ | = | 12-16 | = | 24 | + |
| SMA -SOD123W | 9-16 | = | N/A* | N/A* | 14 | = | 12-16 | = | 16 | + |
| SMB -SOD128W | 9-16 | = | N/A* | N/A* | 14 | = | 12-16 | = | 16 | + |
| SMC | 9-16 | = | N/A* | N/A* | 14 | = | 12-16 | = | 16 | + |
| LFPK (Mosfet / Rectifier) | 9-16 | = | N/A* | N/A* | 14-16 | = | 14-16 | = | 24 | = |
| SO8 (Mosfet) | 26 | + | N/A* | N/A* | 26 | = | 14-16 | = | 30 | = |
| TO220 | 26 | + | N/A* | N/A* | 18-20 | = | 12-16 | = | 20 | + |
| TO247 | 26+ | + | N/A* | N/A* | 18-20 | = | 14-16 | = | 20 | + |
| DPAK | 9-16 | = | N/A* | N/A* | 24 | = | 12-26 | = | 20 | + |
| D2PAK | 9-16 | = | N/A* | N/A* | 26 | = | 8-26 | = | 20 | + |
| DFN's (Small Signal) | 26+ | + | N/A* | N/A* | 14 | = | 12-16 | = | 20 | + |

* No available information as it relates to Mitigation plan and can vary widely

/PRICE & LEAD TIME OVERVIEW - ANALOG AND LOGIC

| Main packages | Diodes Inc | | Nexperia | | ON Semiconductor | | STMicroelectronics | |
|------------------------|------------|----------|----------|----------|------------------|----------|--------------------|----------|
| | LT | LT trend | LT | LT trend | LT | LT trend | LT | LT trend |
| D2PAK | | | N/A* | N/A* | | | 8-26 | = |
| DFN (All) | | | N/A* | N/A* | 26+ | = | 26-26 | = |
| DPAK | | | N/A* | N/A* | | | 16-52 | = |
| PDIP | 26 + | + | N/A* | N/A* | | | | |
| SO14 | 9-16 | = | N/A* | N/A* | 16+ | = | 9-26 | = |
| SO16 | 9-16 | = | N/A* | N/A* | 16+ | = | 9-26 | = |
| SO20 | 9-16 | = | N/A* | N/A* | 16+ | = | 9-26 | = |
| SO24 | 9-16 | = | N/A* | N/A* | 16+ | = | 9-26 | = |
| SO8 | 9-16 | + | N/A* | N/A* | 16+ | = | 9-20 | = |
| SOT23-5/SOT23-6 | 16+ | + | N/A* | N/A* | | | 9-20 | = |
| SOT363/353 (SC70/SC88) | 9-16 | = | N/A* | N/A* | | | 9-20 | = |
| TO220 | 16+ | + | N/A* | N/A* | | | 9-26 | = |
| TSSOP14 | 16+ | + | N/A* | N/A* | 16+ | = | 9-26 | = |
| TSSOP16 | 16+ | + | N/A* | N/A* | 16+ | = | 9-26 | = |
| TSSOP20 | 9-16 | = | N/A* | N/A* | 16+ | = | 9-26 | = |
| TSSOP24 | 9-16 | = | N/A* | N/A* | 16+ | = | 9-26 | = |
| TSSOP48 | | | N/A* | N/A* | 16+ | = | | |
| TSSOP56 | | | N/A* | N/A* | 16+ | = | | |

* No available information as it relates to Mitigation plan and can vary widely

PRICE & LEAD TIME OVERVIEW - MARKET OVERVIEW

| DISCRETE | PRICING TREND | LEAD TIME TREND | LEAD TIME (WEEKS) | COMMENTS |
|--------------|---------------|-----------------|-------------------|----------|
| Small Signal | → | ↑ | 16+ | |
| RF | → | → | 9-16 | |

| POWER | PRICING TREND | LEAD TIME TREND | LEAD TIME (WEEKS) | COMMENTS |
|-------------|---------------|-----------------|-------------------|----------|
| FET | → | ↑ | 16+ | |
| IGBT | → | → | 16+ | |
| Rectifier | → | → | 9-16 | |
| Other Power | → | → | 9-16 | |

| SENSORS & ACTUATORS | PRICING TREND | LEAD TIME TREND | LEAD TIME (WEEKS) | COMMENTS |
|---------------------|---------------|-----------------|-------------------|----------|
| | → | ↑ | 26+ | |

| OPTO | PRICING TREND | LEAD TIME TREND | LEAD TIME (WEEKS) | COMMENTS |
|-------------|---------------|-----------------|-------------------|----------|
| LEDs | Low Power | → | → | 2-8 |
| | Mid Power | → | → | 2-8 |
| | High Power | → | → | 9-16 |
| Couplers | → | → | 9-16 | |
| Fibre-Optic | → | → | 9-16 | |
| Infrared | → | → | 9-16 | |
| Other Opto | → | → | 9-16 | |

| ANALOG | PRICING TREND | LEAD TIME TREND | LEAD TIME (WEEKS) | COMMENTS |
|-----------------------|--------------------------|-----------------|-------------------|----------|
| Standard | Amplifiers & Comparators | → | → | 16+ |
| | Analog Interface | → | → | 16+ |
| | Power Management | → | → | 16+ |
| | Converters | → | → | 16+ |
| Standard Analog Total | → | → | 16+ | |
| Advanced | → | ↑ | 26+ | |

PRICE & LEAD TIME OVERVIEW - MARKET OVERVIEW

| MEMORY | PRICING TREND | LEAD TIME TREND | LEAD TIME (WEEKS) | COMMENTS | |
|--------------------|---------------|-----------------|-------------------|----------|---|
| Flash | NOR | ↑ | ↑ | 16+ | Price increase (around 10-30%) reflects tighter supply coupled with steady demand from automotive, industrial and embedded applications rather than dramatic price declines typical of commodity memory. Lead times likely somewhat extended. TrendForce data shows contract NAND prices rising ~33/38 % in Q1 2026 - with further upward momentum expected into Q2 - as enterprise SSD demand remains high and manufacturers limit bit growth. Spot availability is limited with allocation-based order fulfillment being common. Long lead times persist, often in the 6-12+ month range for many NAND flash products (especially enterprise SSDs and high-capacity wafers). |
| | NAND | ↑ | ↑ | 16+ | |
| eMMC | ↑ | → | → | 16+ | Ongoing memory shortages and strong market demand have pushed eMMC prices upward, influenced by general NAND cost inflation and ongoing tight supply. Lead times are extended but not extreme compared with high-end memories. |
| EEPROM | → | → | → | 16+ | Moderate upward pressure on EEPROM pricing is expected overall, not as dramatic as for DRAM/NAND but still elevated compared with pre-2025 levels. Market intelligence from distributor reports historically shows EEPROM lead times ranging from ~6 to ~28 weeks depending on manufacturer, part family, and grade. |
| DRAM | ↑ | ↑ | ↑ | 16+ | In Q1 2026, DRAM prices reportedly jumped ~50-60% QoQ, with indications of further increases (~20% or more) expected into Q2 2026 as supply remains constrained and prioritization toward high-margin AI memory continues. Upward price momentum into mid-2026. Lead times are significantly extended, often ranging from ~20 weeks to 12+ months depending on product class, with particularly long durations for mainstream PC, automotive, and specialized segments. |
| SRAM | → | ↑ | ↑ | 16+ | Expect modest upward pressure overall and generally elevated pricing relative to historical norms, particularly for specialized grades (e.g., automotive-qualified, high-speed synchronous SRAM). Pricing isn't as volatile or headline-grabbing as DRAM or NAND, but the tight memory market climate should keep prices firm. Lead times are extended, especially for automotive and industrial grades, often stretching multiple months. |
| Solid State Drives | ↑ | ↑ | ↑ | 26+ | |

| PROGRAMMABLE LOGIC | PRICING TREND | LEAD TIME TREND | LEAD TIME (WEEKS) | COMMENTS |
|--------------------|---------------|-----------------|-------------------|---|
| | → | ↑ | 26+ | Extension of leadtimes across all nodes, boards & dev systems included. To ensure availability, please provide long term visibility asap. |

| MOS MICRO LOGIC | PRICING TREND | LEAD TIME TREND | LEAD TIME (WEEKS) | COMMENTS |
|-----------------|-----------------|-----------------|-------------------|----------|
| MPU | → | → | 26+ | |
| MCU | 8 Bit & Lower | → | → | 16+ |
| | 16 Bit | → | → | 16+ |
| | 32 Bit & Higher | → | → | 26+ |
| MCU Total | → | ↑ | 16+ | |
| Automotive MCU | → | → | 26+ | |
| DSP | → | → | 26+ | |

| STANDARD LOGIC | PRICING TREND | LEAD TIME TREND | LEAD TIME (WEEKS) | COMMENTS |
|-----------------|---------------|-----------------|-------------------|----------|
| Timing Products | → | → | 26+ | |
| Interface | → | → | 26+ | |
| Connectivity | → | → | 26+ | |
| Standard Logic | → | → | 16+ | |

PRICE & LEAD TIME OVERVIEW - SUPPLIER SPECIFICS

| SUPPLIER | PRODUCT | LEAD TIME (WEEKS) | COMMENTARY |
|-----------------|---------------------------|-------------------|--|
| Alliance Memory | SRAM, DRAM | 4-8 | Lead times and prices trends up. |
| | Flash NOR, NAND | 6-12 | Increased lead times. |
| | eMMC | 12-16 | Lead times and prices trends up. |
| Cirrus | MS Audio | 16-26 | Slightly increased lead times. |
| | UK Audio | 16-26 | Slightly increased lead times. |
| | UK Mems | 16-26 | Slightly increased lead times. |
| Coilcraft | Shielded Power Inductors | 6-10 | Stable lead times. |
| | RF inductor, ceramic core | 6-10 | Stable lead times. |
| Diodes Inc | Discrete | 26 | Increased lead times following supply switch to balance Nexperia Chinese source devices. Main packages impacted: SOT89 - SOT323 and DFN. |
| ISSI | Flash NOR, NAND. | 12-20 | Lead times increasing leading to price increases. |
| | eMMC | N/A | Allocation. |
| | DRAM | 10-44 | Lead times are increasing a lot. Consequently, pricing trend up too. |
| | SRAM | 10-16 | Lead times and pricing situation remain stable, under control. |
| Macronix | Flash NOR | 24+ | Lead times increasing leading to price increases. |
| | Flash NAND | N/A | Allocation. |
| | eMMC | N/A | Allocation. |
| Marvell | ICs | 26 | Stable lead times. |
| | Boards | 20-52 | Stable lead times. |
| Microchip | All | 10-40 | Stable lead times. |
| Micron | All | 16+ | Pricing Trend: Micron has strong pricing power in the current market, with DRAM and advanced memory contract prices elevated and expected to remain high or continue increasing through Q2 2026 due to persistent supply tightness and strong end-market demand. Lead Time Trends: Industry supply data show that DRAM lead times are lengthening significantly, with some Micron DDR4/DDR5 components reported at ~39+ weeks, reflecting scarce available supply and high bookings toward hyperscalers and cloud customers. Strategic Strengths: Micron is investing heavily in expanding production capacity, including acquisition of a fab in Taiwan closing in Q2 2026, with output intended to support future DRAM growth (production coming online in 2027). |
| | DDR4 and LPDDR4 | N/A | LP4 production transferred to Micron legacy fab in Manassas as a long term commitment to this technology and ensure production capacity for the future. Output of this move expected also in CY27. |

to be continued... >>

/ PRICE & LEAD TIME OVERVIEW - SUPPLIER SPECIFICS

| SUPPLIER | PRODUCT | LEAD TIME (WEEKS) | COMMENTARY |
|--------------------|------------------------------------|-------------------|---|
| MPS | All | 20-36 | Increased lead times. |
| Nexperia | All | N/A | Nexperia extending visibility through part number level capacity information sharing resulting into reliable confirmations when Mitigation Plan allows (Mostly 3 months window) |
| Nordic Semi | All | 20-26 | Slightly increased lead times. |
| Quectel | All | 12-20 | Slightly increased lead times. |
| Renesas | Embedded | 18 | Lead times remain stable. |
| | Processing | 14 | Lead times remain stable. |
| | High Performance Computing | 24 | Lead times remain stable. |
| | Analog and Connectivity | 12-18 | Lead times remain stable. |
| | Power | 12-18 | Lead times remain stable. |
| Sandisk | eMMC, UFS, BGA | 12-26 | Increased lead times. |
| | USB, SD, PCIe, SATA | 8-12 | Stable lead times. |
| | eMMC MLC (SDINBDG4-xxx) | 14 | Not recommended for new projects. Please get in touch with our sales team to find alternatives. |
| | eMMC 3D Nand (SDINBDA6-xxx) | 12 | |
| | microSD (SDSDQAF3 / SDSDQAF4 etc.) | 8-10 | |
| | SD Cards (SDSDAF3 / SDSDAF4 etc.) | 8-10 | |
| | SSD | 10-12 | |
| Semtech | ISM SX12** Family | 16-20 | Slightly increased lead times. |
| | ISM SX13** Family | 16-20 | Slightly increased lead times. |
| | Power Discrete | 10-20 | Stable lead times. |
| | TVS | 12-16 | Stable lead times. |
| | Genum | 22-28 | Stable lead times. |

/ PRICE & LEAD TIME OVERVIEW - PRODUCT LIFE NEWS

| SUPPLIER | PRODUCT | STATUS | COMMENTARY |
|----------------------------------|---|---|---|
| AMD (Xilinx Native) | Versal HBM Adaptive SoCs | End of Life | Last time buy June 30th 2026, please place your EOL orders early enough to secure availability. Lead times around 36 weeks. |
| NXP | Numerous HPA Parts | End of Life due to reduced sales and low demand | 202507021DN : Last Time Buy July 13th, 2026. A majority of the replacement parts are functionally similar, but not package and pin out compatible. Please anticipate your EOL orders. |
| NXP | Secure Edge Identification H2/25 Discontinuation | End of life | 202511028DN - Last Time Buy September 18th, 2026 |
| Renesas | Analog and Power products (Native Intersil & IDT devices) | End of Life | PLC25010A - 2 "waves" of Last Time Buy : for standard devices, Last Time Buy is December 6th, 2025. For Custom / Proprietary products, LTB is June 6th, 2026. Some parts have a replacement part, some do not. Please place your EOL asap to ensure supply. |
| Renesas | Legacy Renesas MCU | End of Life | EOL250013 - 2 waves of Last Time Buy : January 31st, 2026 and July 31st, 2026. Plan and place your orders as soon as possible. |
| Renesas (Intersil Native) | Selected AdHoc parts | End of Life due to reduced sales and low demand | PLC25032 - Last Time Buy June 26th, 2026. |
| STMicroelectronics | All | End of Life | Several devices moving to EOL due to fab reshaping program. All relevant PTN have been sent to customers. 1st wave, discrete devices with last time buy February 1st, 2026. For others, please refer to PTN. |