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MARKET DATA AND PRICE LEAD TIMES - Q2 / 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 moving further into an upcycle. Demand momentum is expected to continue well, particularly as investments in data centre remain the driver and are fuelling many areas of the industry.

Memory markets are clearly benefiting today. The prioritization of advanced HBM technologies is tightening supply for DDR4 and DDR5. This maintains price inflation and makes ASP growth a key contributor to overall market expansion. At the same time, Edge AI is accelerating demand in industrial MCU and analogue portfolios.

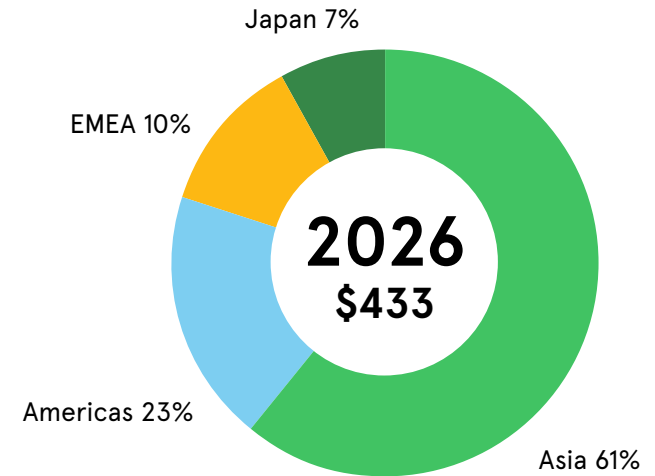
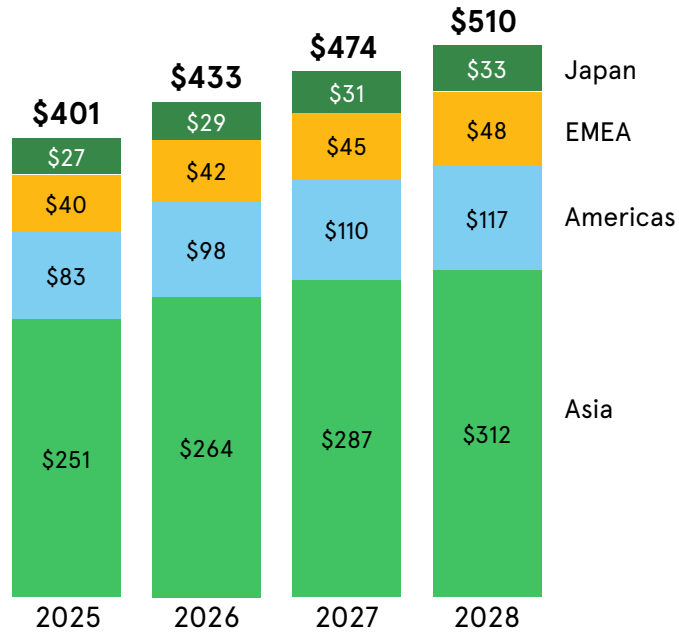
This demand is now being challenged by geopolitical tensions. The escalation of the Iran conflict is creating fragility in the supply chain. Helium shortages, for instance, are driving allocation measures at leading Asian foundries. In parallel, disruptions in industrial gases, energy supply and logistics are increasing costs and adding complexities across the ecosystem.

In Europe, the picture is mixed. While lead times are extending and component prices are rising, customer activities have increased, but this looks more like business continuity buying than a true demand led recovery. Segment-wise, Automotive market is regaining momentum while Industrial demand is becoming more visible in sub-segments such as Factory Automation and Energy Management.

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)

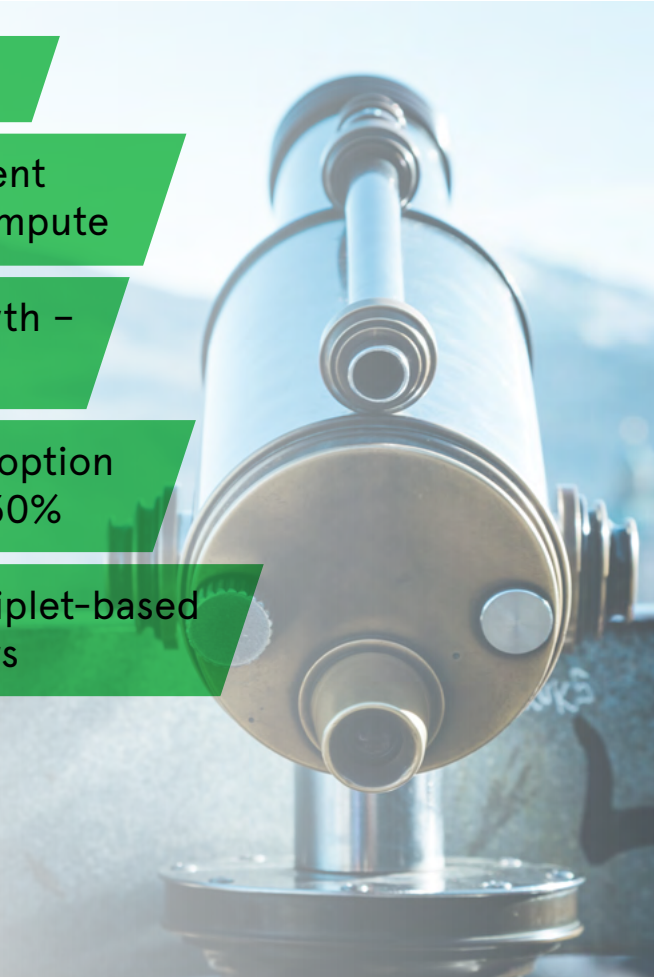


Region	2025	2026	2027	2028	3-YR CAGR	3-YR Growth
Americas	10.1%	17.6%	12.7%	6.4%	12.2%	\$34.1
Asia	15.7%	5.1%	8.8%	8.8%	7.6%	\$61.4
EMEA	-0.7%	5.1%	7.0%	6.1%	6.1%	\$7.8
Japan	0.3%	7.1%	8.1%	6.1%	7.1%	\$6.1
Worldwide	11.5%	7.9%	9.5%	7.8%	8.4%	\$109.4

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

/ 2026 GLOBAL OUTLOOK

- Market growth strong as served-semi market \uparrow 7.9% Y/Y to \$433B
- 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%
- Cloud-based EDA adoption became the standard for new AI startups; Chiplet-based designs drove demand for advanced packaging substrates and interposers
- U.S. inflation increases to 3.3% in March; highest since May 2024
- WW GDP growth at 3.0% for 2026:
 - Major forecasters range from 2.6%–3.2%; IMF, OECD, S&P, etc.



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

/ EUROPEAN MANUFACTURING PMI – SNAPSHOT

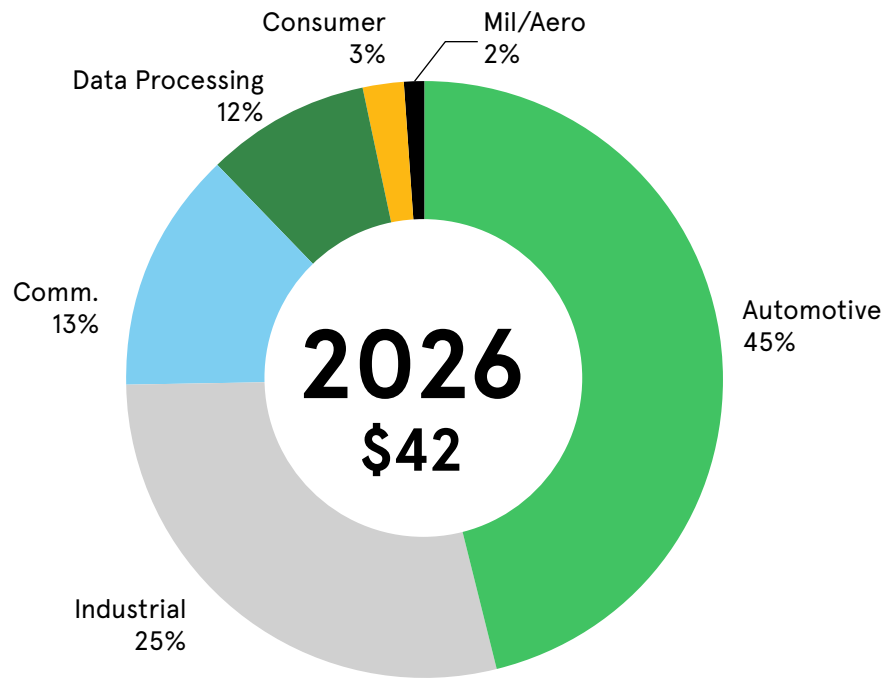
The European PMI achieved its best result in 45 months, up from 50.8 in February. The Manufacturing Output Index rose to 52.0, from February number of 51.9. However, while the February EU PMI could be viewed as a potential growth story, driven by customers refilling depleted inventories, March is more likely to reflect buying for business continuity following the start of the Gulf conflict. This argument is underpinned by an increase in new orders. Looking at the latest IMF World Economic Outlook, the IMF has already shaved 0.2% off the EU GDP forecast – and this represents the positive scenario. Within the PMI calculation, there is an index for supplier delivery times, where an increase can signal growth. However, rather than being a purely demand-driven story, the lengthening of supplier delivery times to their greatest extent in three and a half years reflects the repercussions of the Gulf conflict across all modes of transport. Input prices, for their part, are increasing at the fastest rate in 41 months. Among the major economies, PMIs in Germany and Italy improved, while France stagnated. EU business confidence, while still generally positive, has dipped to a five-month low.



Source: Avnet estimate based on industry data – April 2026

EMEA SERVED SEMI VERTICAL MARKET GROWTH (\$B)





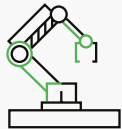



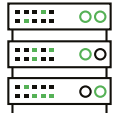






(EXCLUDES DRAM, FLASH, MPU COMPUTE, GPU, AI PROCESSORS)



Vertical	2026
Automotive	\$19
Industrial	\$10
Communication	\$6
Data Processing	\$5
Consumer	<\$1
Mil/Aero	<\$1

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

TOP APPLICATION GROWTH EMEA

Application	Vertical	2025	2028	Δ	3-YR CAGR	
ADAS	 Automotive	\$4.0	\$5.4	\$1.4	10.1%	
Electrified Powertrain		\$3.3	\$4.3	\$1.0	9.4%	
Automotive HPC		\$1.3	\$2.2	\$0.8	17.0%	
Transportation	 Industrial	\$2.0	\$2.6	\$0.5	7.8%	
Energy Management		\$1.4	\$2.0	\$0.5	11.5%	
Agriculture		\$0.6	\$1.0	\$0.3	15.4%	
PCs	 Data Processing	\$1.9	\$2.4	\$0.5	8.1%	
Servers		\$1.7	\$2.1	\$0.4	7.5%	
Smart Phones	 Communication	\$1.2	\$1.7	\$0.5	11.8%	
Other Military/Aerospace	 Mil/Aero	\$0.6	\$0.9	\$0.3	16.3%	

Source: Avnet estimate based on industry data – April 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	8	=	16+	=	N/A	N/A	N/A	N/A
SOD123 (F)	40	+	26	=	16+	=	20-25	+	20-24	+
SOD323 (F)	40	+	26	=	16+	=	15-25	+	26	+
SOD523	40	+	26	=	16+	=	15-25	+	26	+
SOT23	40	+	26	+	16+	=	15-25	+	24-30	+
SOT323 (SC70)	40	+	26	=	16+	=	15-25	+	25-27	+
SOT363 (SC88)	40	+	26	-	16+	=	N/A	N/A	23-25	+
SOT89	40	+	26	=	16+	=	N/A	N/A	16	=
SOT223	40	+	26	=	16+	=	15-25	+	18	=
SMA -SOD123W	20-24	+	16	=	14	=	15-25	+	16-30	+
SMB -SOD128W	20-24	+	16	=	14	=	15-25	+	18	+
SMC	20-24	+	26	=	14	=	15-25	+	20	+
LFPK (Mosfet / Rectifier)	9 - 16	=	26	=	14-16	=	19	=	24	=
SO8 (Mosfet)	40	+	16	=	26	=	11-19	=	30	=
TO220	16+	=	16	=	18-20	=	15-19	=	20	=
TO247	40	+	16	=	18-20	=	20	=	25	+
DKPAK	9 - 16	=	16	=	24	=	13-19	=	25	+
D2PAK	9 - 16	=	16	=	26	=	19	=	25	+
DFN's (Small Signal)	40	+	16	=	14	=	13-23	=	25	+

* 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	16	=	N/A	N/A	15	=
DFN (AII)	N/A	N/A	16	=	26+	=	15	=
DPAK	N/A	N/A	16	=	N/A	N/A	15	=
PDIP	40	+	N/A	N/A	N/A	N/A	N/A	N/A
SO14	9 - 16	=	24	=	16+	=	15-29	=
SO16	9 - 16	=	16	=	16+	=	15-29	=
SO20	9 - 16	=	16	=	16+	=	15-29	=
SO24	9 - 16	=	26	=	16+	=	15-29	=
SO8	9 - 16	=	16	=	16+	=	15-29	=
SOT23-5/SOT23-6	16+	+	26	+	N/A	N/A	18-28	=
SOT363/353 (SC70/SC88)	40	+	26	=	N/A	N/A	20-28	=
TO220	16+	+	16	=	N/A	N/A	15	=
TSSOP14	36	+	26	-	16+	=	15-29	=
TSSOP16	36	+	26	-	16+	=	15-29	=
TSSOP20	26	=	26	-	16+	=	15-29	=
TSSOP24	26+	=	26	-	16+	=	15-29	=
TSSOP48	N/A	N/A	16	=	16+	=	N/A	N/A
TSSOP56	N/A	N/A	16	=	16+	=	N/A	N/A

* 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	↑	↑	26+	Price increases accross main suppliers except Nexperia.
RF	↑	↑	26+	

POWER	PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)	COMMENTS
FET	↑	↑	16+	Price increases accross main suppliers except Nexperia.
IGBT	↑	↑	16+	
Rectifier	↑	↑	16+	Price increases accross main suppliers except Nexperia.
Other Power	↑	↑	16+	

SENSORS & ACTUATORS	PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)	COMMENTS
	↑	↑	26+	Capacity limitation on sensors, please plan your needs long term.

OPTO	PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)	COMMENTS
LEDs	Low Power	↑	↑	9-16
	Mid Power	↑	→	9-16
	High Power	→	→	9-16
Couplers	↑	→	16+	
Fibre-Optic	↑	→	16+	
Infrared	↑	→	16+	
Other Opto	↑	→	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 increases on main suppliers.

PRICE & LEAD TIME OVERVIEW - MARKET OVERVIEW

MEMORY	PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)	COMMENTS	
Flash	NOR	↑	↑	26+	No reverting trends signs nor on price or lead time.
	NAND	↑	↑	26+	Long lead times persist, often in the 6-12+ month range for many NAND flash products. As such pricing pressure remains high while spot availability is becoming even more challenging.
eMMC	↑	↑	26+	Although overall NAND pricing is rising sharply in 2026, eMMC specifically is being "crowded out" rather than actively expanded not leading to any relief. Over the next few months, eMMC will remain available but increasingly "managed" by suppliers. The risk is not a sudden price spike, but supply, allocation, and lifecycle constraints.	
EEPROM	↑	→	16+	Over the next months, the EEPROM market will remain stable. No major spikes, no crashes, just controlled supply, steady demand, and quiet pressure on both pricing and lifecycle management.	
DRAM	↑	↑	26+	DRAM market remains one of the tightest semiconductor segments globally as AI dominates demand. Pricing will keep increasing as AI demand remain strong affecting mostly DDR4/DDR5 with an increasingly pressure over to DDR5 as well.	
SRAM	↑	→	16+	Compared to DRAM/NAND based products, SRAM is predictably stable next months to come. Major risk is related to Geopolitical situation driving raw material cost increases leading to possible upwards pricing but solely modest.	
Solid State Drives	↑	↑	26+	As the overall NAND market situation goes up, SSD will remain highly sensitive too and unlikely resolving faster than other technologies.	

PROGRAMMABLE LOGIC	PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)	COMMENTS
	→	↑	40+	Extension of leadtimes from 26 to 40 weeks+, and specific families at 52 weeks already. Please send your forecasts for CY27 if you want to secure supply.

MOS MICRO LOGIC	PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)	COMMENTS	
MPU	↑	↑	26		
MCU	8 Bit & Lower	↑	↑	26+	
	16 Bit	↑	↑	26	
	32 Bit & Higher	↑	↑	26	
MCU Total	↑	↑	26	Leadtime and pricing increasing on certain product technologies.	
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	↑	→	26	Price increases across main suppliers except Nexperia.

PRICE & LEAD TIME OVERVIEW - SUPPLIER SPECIFICS

SUPPLIER	PRODUCT	LEAD TIME (WEEKS)	COMMENTARY
Alliance Memory	SRAM, DRAM	12-16	Lead time and price trends up.
	Flash NOR, NAND	12-16	Increased lead times.
	eMMC	16	Lead time and price still increasing.
Cirrus	MS Audio	16-26	Slightly increased lead time.
	UK Audio	16-26	Slightly increased lead time.
	UK Mems	16-26	Slightly increased lead time.
Coilcraft	Shielded Power Inductors	8-12	Stable lead time.
	RF inductor, ceramic core	8-12	Stable lead time.
ISSI	Flash NOR	26	Lead time increasing.
	eMMC	N/A	ALLOCATION.
	DRAM	N/A	ALLOCATION.
	SRAM	10-20	Lead time slightly increasing.
	NAND	N/A	ALLOCATION.
Lumileds	Leds	12	Price increases announced on certain product families such as Low Power, Midpower, COB, 5050 etc...
Macronix	Flash NOR	up to 52	Lead times increasing leading to price increases.
	Flash NAND	up to 52	ALLOCATION.
	eMMC	up to 52	ALLOCATION.
Marvell	ICs	26-32	Stable lead time.
	Boards	26-52	Stable lead time.
Microchip	ALL	10-40	Stable lead time.
Micron	ALL	26+	HBM focus drives DRAM supply and pricing behaviors. DDR/LPDDR4 shipment volumes (GB equivalent) are almost cleared up for 2026 and under discussions for the next years to come. Getting visibility is a must have/do. 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	52+	ALLOCATION. 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.
	DDR5 and LPDDR5	52+	ALLOCATION. As for DDR4/LPDDR , shipment volumes (GB equivalent) are under discussions for the next years to come. Getting visibility is now a must have/do . 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).

to be continued... >>

PRICE & LEAD TIME OVERVIEW - SUPPLIER SPECIFICS

SUPPLIER	PRODUCT	LEAD TIME (WEEKS)	COMMENTARY
MPS	ALL	32-40	Increased lead time.
Nexperia	Standard Logic	16-24	Lead time increase but stable pricing.
	Mini Logic – MicroPak (GS, GM, GX, GT, GN)	8-12	Stable lead times Capacity in place and stable prices.
	Mini Logic – Picogate (GW, GV)	12-16	Lead time increase but stable pricing.
	Power Mosfets	16	"Capacity is improving as planned with significant stabilization started already in CY26Q2. Lead times decreasing from an average of ~26 weeks (allocation) to ~16 weeks (Exception: LFPAK 88; LFPAK56D). AI server market demand driven supply bottlenecks to remain throughout the next quarters for Hot Swap ASFETs."
	Small Signal Mosfets	16-26	"For China-impacted parts, capacity expansion is in progress, with improvement expected for several types in CY26H2. Accelerating existing capacity expansion plan. Stable pricing."
	Small Signal – Others	16-26	Capacity is improving. Stable prices, they have decided not to increase their prices.
Nordic Semi	ALL	20-30	Slightly increased lead time.
NXP	Sensors division	39+	NXP sold its Sensors division to STMicroelectronics, please keep sending your inquiries and orders.
Quectel	ALL	16-26	Increased lead time, partial allocation.
Renesas	Embedded	18	Lead times remain stable.
	Processing	18-24	Lead times increasing.
	High Performance Computing	26	Lead times increasing.
	Analog Mixed Signal	12-22	Lead times increasing.
	Power	12-20	Lead times increasing.
Sandisk	ALL	N/A	ALLOCATION.
Semtech	ISM SX12** Family	16-20	Slightly increased lead time.
	ISM SX13** Family	16-20	Slightly increased lead time.
	Power Discrete	10-20	Stable lead time.
	TVS	14-18	Slightly increased lead time.
	Genum	22-28	Stable lead time.

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 have moved from 36 weeks to 52 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.
NXP	Selected Products Due to Manufacturing Capabilities_Update (MPC, DSP & MCU)	End of Life	202601026DNU01: Last Time Buy July 30th, 2026, but since parts are these being manufactured with legacy technology and aging production tools, we highly recommend to anticipate both PO placement and deliveries to ensure supply.
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, Last Time Buy is June 6th, 2026. Some parts have a replacement part, some do not. Please place your End Of Life orders as soon as possible to ensure supply.
Renesas	Legacy Renesas MCU	End of Life	EOL250013 - 2 "waves" of Last Time Buy: January 31st, 2026 and July 31st, 2026. Please plan and place your orders as soon as possible.
Renesas (IDT Native)	Selected parts	End of Life due to reduced sales and low demand	PLC260012: Last Time Buy September 11th, 2026, most of those without any potential replacement, please plan your End Of Life 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.
Renesas (Intersil Native)	Selected parts	End of life	PLC26005-A: 2 "waves" of Last Time Buy due to 3rd party restrictions. First Last Time Buy May 30th, 2026 for a small number of skews, then August 16th, 2026.