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MARKET DATA AND PRICE LEAD TIMES - Q3 / 2026

AVNET SILICA

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August 2026

/EXECUTIVE SUMMARY

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The global semiconductor market remains firmly in growth mode, with demand expected to expand strongly through 2029. Asia continues to lead the cycle, supported by sustained investment and accelerating technology adoption across multiple sectors.

AI remains a key driver of semiconductor demand, particularly in data centre infrastructure, where investments continue to boost demand for memory, power, interconnect and thermal management solutions. However, the benefits are not evenly distributed. The prioritisation of High Bandwidth Memory (HBM) is tightening supply across broader memory categories and creating cost pressure in PCs, smartphones, servers and many other electronic devices across the industries. At the same time, Edge AI is extending growth opportunities into industrial and embedded applications, driving demand for analogue products, sensors, microcontrollers and power management devices.

Geopolitics continues to reshape supply chain strategies. Tariffs, export controls and localisation requirements are becoming long-term business considerations, while supply chain diversification is improving resilience but adding complexity and cost.

In Europe, manufacturing activity continued to improve during the second quarter, marking the strongest quarter since 2022. Output growth and business confidence remain positive, although export demand is still weak and economic growth expectations have softened. The coming months will show whether recent order strength can translate into a broader recovery.

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)

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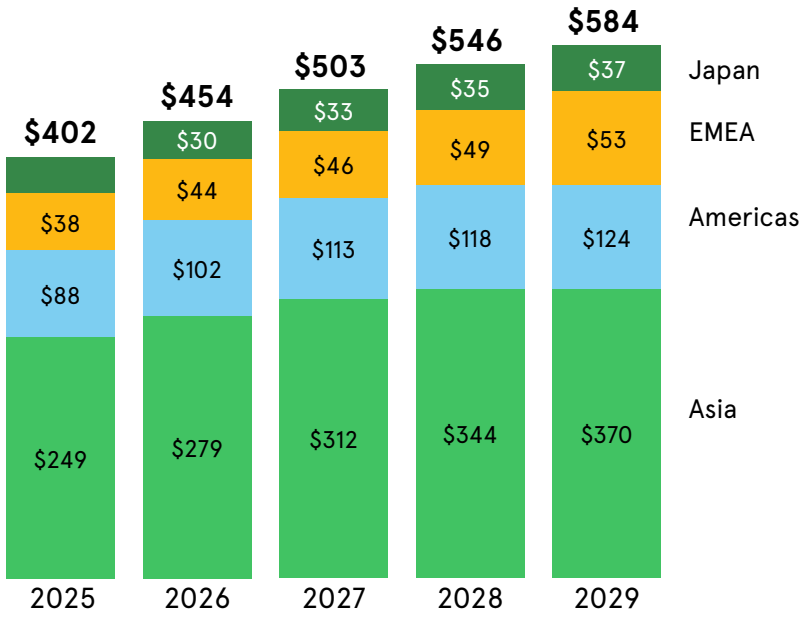
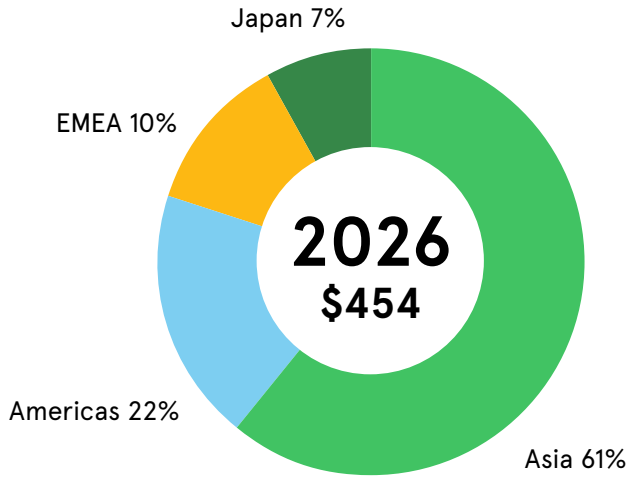


Region	2025	2026	2027	2028	2029	3-YR CAGR	3-YR Growth
Americas	17.2%	15.9%	10.8%	4.5%	5.5%	6.9%	$22.5
Asia	15.6%	12.3%	11.6%	10.4%	7.5%	9.8%	$90.5
EMEA	-2.8%	13.8%	6.1%	6.5%	8.0%	6.9%	$9.6
Japan	-0.2%	9.5%	10.3%	6.2%	5.2%	7.2%	$6.9
Worldwide	**12.7%**	**13.0%**	**10.8%**	**8.4%**	**7.0%**	**8.7%**	**$129.6**



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

/2027 GLOBAL OUTLOOK

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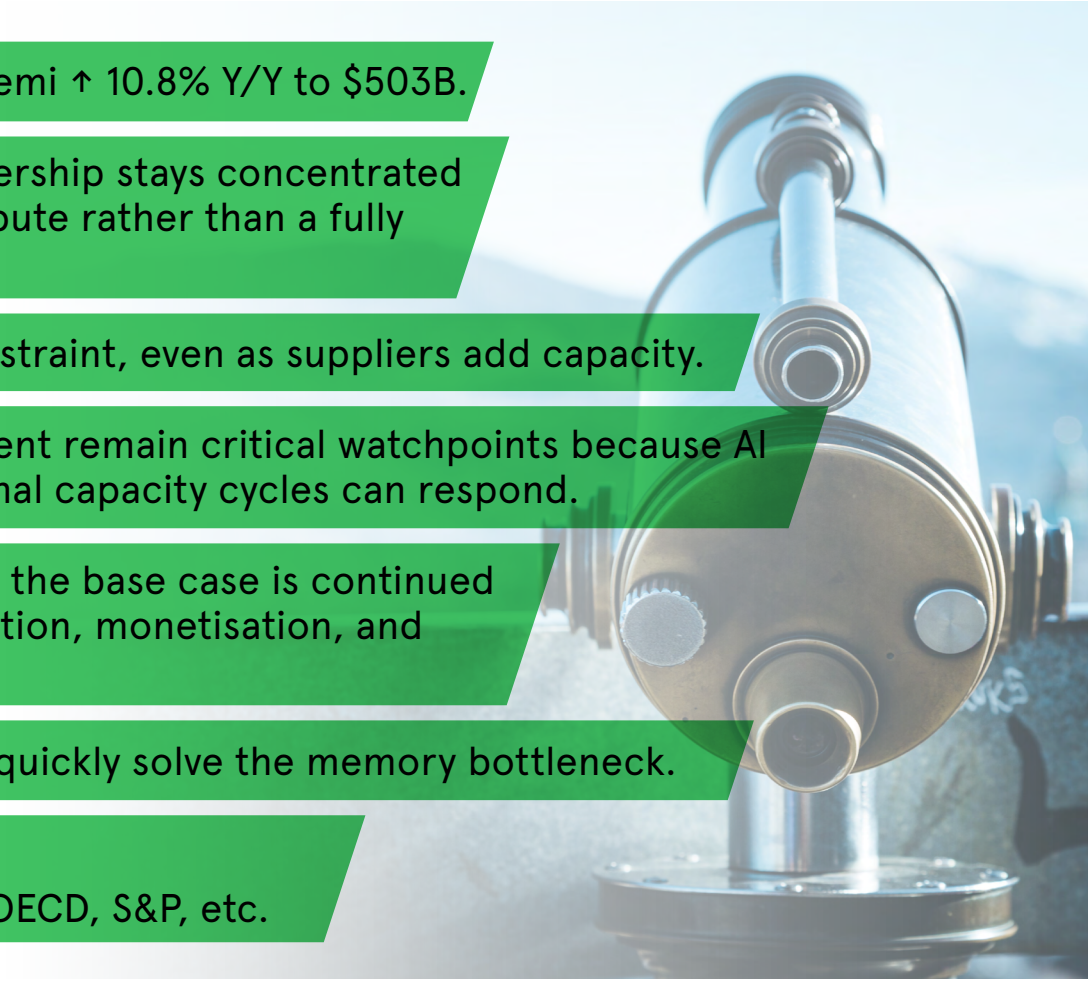
- Market entering broad-based recovery: served-semi ↑ 10.8% Y/Y to $503B.
- The story remains expansionary, but growth leadership stays concentrated in AI infrastructure, memory, and advanced compute rather than a fully normalised end-market recovery.
- Memory availability should remain a planning constraint, even as suppliers add capacity.
- Advanced packaging, test, and wafer fab investment remain critical watchpoints because AI hardware complexity is rising faster than traditional capacity cycles can respond.
- Hyperscaler spending is still the key swing factor: the base case is continued investment, but investors are still watching utilisation, monetisation, and possible overbuild signals more closely.
- Regionalisation remains important but it will not quickly solve the memory bottleneck.
- Global GDP growth at 3.0% for 2027.
  - Major forecasters range from 2.8%-3.4%; IMF, OECD, S&P, etc.



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

EUROPEAN MANUFACTURING PMI – SNAPSHOT

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The Eurozone Manufacturing PMI continued its expansionary trend for a fifth consecutive month, with only a slight decrease in June, from 51.6 to 51.4. Supporting the EU's current momentum was an increase in Manufacturing Output to 51.7, up from 51.3 in May. Among the countries included in the EU index, only France and Spain reported a decline in production. This was, in fact, the strongest manufacturing quarter for the EU since 2022. New orders were reported to have increased modestly, although export orders continue to weigh on the EU PMI. In June, manufacturers relied more heavily on existing inventories, reducing purchases and drawing down stock levels while fulfilling a greater share of business from backlogs. At the time of the survey, supply chain pressures were reported to be gradually easing, with some improvement in supplier delivery performance, although conditions remained below pre-Middle East conflict levels. The sharp increases in input cost inflation and output prices moderated, with June showing the weakest rate of increase since March. Business confidence also improved, supported by lower energy prices and improving supplier delivery performance. Looking at the broader economy, the IMF, in its latest report, downgraded the EU's 2026 GDP growth forecast to 0.9% from 1.1%, partly due to concerns over persistently high energy costs compared with the start of the year and weak consumer confidence. Over the next few months, it will be important to see whether the pull-ahead in orders observed during Q2 leads to a lull in Q3, or whether the economy gains momentum through new order growth.

Source: Avnet estimate based on industry data – July 2026

EMEA SERVED SEMI VERTICAL MARKET GROWTH ($B)

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

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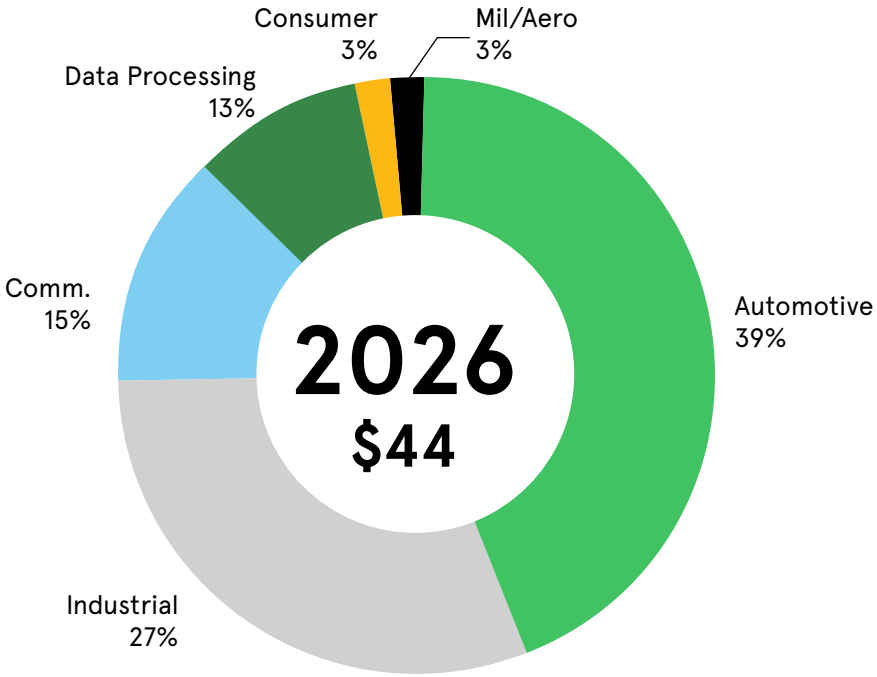

Vertical	2026
Automotive	$17
Industrial	$12
Communication	$6
Data Processing	$5
Consumer	<$2
Mil/Aero	<$2

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

/TOP APPLICATION GROWTH EMEA

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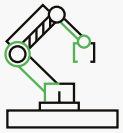
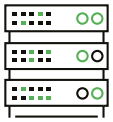
Application	Vertical	2026	2029	Δ	3-YR CAGR	
Electrified Powertrain	 Automotive	$4.9	$6.4	$1.4	9.0%	
ADAS		$3.6	$4.7	$1.1	8.9%	
Infotainment and Cluster		$2.6	$3.1	$0.5	5.8%	
Chassis		$1.3	$1.7	$0.4	9.9%	
Automotive HPC		$0.5	$0.9	$0.4	21.5%	
Transportation	 Industrial	$2.5	$3.3	$0.8	10.3%	
Energy Management		$1.8	$2.6	$0.8	13.0%	
Automation		$1.2	$1.6	$0.4	10.8%	
PCs	 Data Processing	$1.9	$2.7	$0.8	12.0%	
Smart Phones	 Communication	$1.4	$1.9	$0.5	11.1%	

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

/PRICE & LEAD TIME OVERVIEW - DISCRETE

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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			8	=	16+	=				
SOD123 (F)	40	=	>26	=	40-45	+	25-30	+	20-24	=
SOD323 (F)	40	+	>26	+	40-45	+	25	+	26	=
SOD523	26+	+	>26	=	52	+	25-30	+	26	=
SOT23	40	+	>26	=	52	+	25-30	+	24-30	=
SOT323 (SC70)	40	+	>26	+	40-52	+	25-30	+	24-30	=
SOT363 (SC88)	40	+	26 - >26	=	40-52	+	25-30	+	24-30	=
SOT89	40	+	>26	=	20-40	+	20-30	+	22	+
SOT223	40	+	16 - >26	-	15-30	+	20-30	+	18-24	=
SMA -SOD123W	26	+	16	=	12-20	+	15-20	=	18	=
SMB -SOD128W	26	+	16	=	12-20	+	15-20	=	18	=
SMC	26	+	26	=	12-20	+	15-20	=	20	=
LFPAK (Mosfet / Rectifier)	9 - 16	=	13 - 26	=	25-35	+	14-22	+	24	=
SO8 (Mosfet)	40	+	16	=	30	+	14-22	+	26-30	=
TO220	16+	=	16	=	15-25	+	12-20	+	20	=
TO247	40	=	16	=	25-30	+	16-24	+	25	=
DPAK	9 - 16	=	16	=	18-28	+	14-20	+	25	=
D2PAK	9 - 16	=	16	=	26	+	20	=	25	=
DFN's (Small Signal)	40	=	16 - >26	=	50	=	25	+	25	=

/PRICE & LEAD TIME OVERVIEW - ANALOG AND LOGIC

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Main packages	Diodes Inc		Nexperia		ONSemiconductor		STMicroelectronics	
	LT	LT trend	LT	LT trend	LT	LT trend	LT	LT trend
D2PAK			16	=	14	=	18	=
DFN (All)			16	=	26+	=	18	=
DPAK			16	=	14	=	18	=
PDIP	40	=						
SO14	9 - 16	=	24	+	24	=	15	=
SO16	9 - 16	=	16	+	24	=	18	=
SO20	9 - 16	=	16	+	26	=	20	=
SO24	9 - 16	=	26	=	28	=	22	=
SO8	9 - 16	=	16	=	24	=	16	=
SOT23-5/SOT23-6	16+	+	26	=	26	=	16	=
SOT363/353 (SC70/SC88)	40	+	26	=	28	=	16	=
TO220	16+	=	16	=	15	=	17	+
TSSOP14	36	+	26	=	26	+	20	+
TSSOP16	36	+	26	=	26	+	20	=
TSSOP20	26	=	26	=	27	+	21	=
TSSOP24	26+	=	26	=	24-34	+	20-26	+
TSSOP48			16	=	28-36	+		
TSSOP56			16	=	30-40	+		

/PRICE & LEAD TIME OVERVIEW - MARKET OVERVIEW

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DISCRETE	PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)	COMMENTS
Small Signal	↑	↑	26+	
RF	→	→	26	

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

SENSORS & ACTUATORS	PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)	COMMENTS
	↑	↑	26+	Capacity limitation on sensors, 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 & LEAD TIME OVERVIEW - MARKET OVERVIEW

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MEMORY	PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)	COMMENTS
Flash – NOR	↑	↑	16+	Price increases mostly across automotive and high-density NOR. Lead times 10–18 weeks (commercial) and 16–26 weeks (industrial/ automotive). Availability reducing for standard Serial NOR; tighter for automotive, Octal SPI and long-life devices.
Flash – NAND	↑	↑	26+	Price increases keep going on while lead times are extending to above 30 weeks for high-density and automotive devices.
eMMC	↑	↑	26+	Price increases keep going on while lead times are extending to above 30 weeks for high-density and automotive devices.
EEPROM	→	→	16+	Raw material cost, energy cost drive slight upward price trend for automotive and industrial grades. Lead times 16+ weeks, extending over ~30+ weeks for automotive and long-life products.
DRAM	↑	↑	26+	Continious price increases driven by AI demand and declining DDR4 production. DDR4/LPDDR4 on allocation. DDR5 lead times increasing. Supply remains tight but manageable with early forecasting and long-term commitments.
SRAM	→	→	16+	Raw material cost, energy cost increase drives price adjustments, with selective increases for automotive and high-reliability devices. Lead times 12–20 weeks. Good availability for standard SRAM; tighter for industrial, defense and long-life products.
Solid State Drives	→	↑	26+	Moderate price increases, mainly for enterprise SSDs. Lead times stretching up across leading to tighter availability specificall tighter for enterprise PCIe Gen5 and industrial SSDs.

PROGRAMMABLE LOGIC	PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)	COMMENTS
	→	↑	26+	Many parts with 1 year leadtime, ensure you give visibility up to end of CY27.

MOS MICRO LOGIC	PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)	COMMENTS
MPU	↑	↑	26+	Prices and lead times increasing across the board, provide visibility to ensure supply.
MCU – 8 Bit & Lower	↑	↑	26+	
MCU – 16 Bit	↑	↑	26+	
MCU – 32 Bit & Higher	↑	↑	26+	
MCU Total	↑	↑	26+	Prices and lead times increasing across the board.
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 & LEAD TIME OVERVIEW - SUPPLIER SPECIFICS

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SUPPLIER	PRODUCT	LEAD TIME (WEEKS)	COMMENTARY
Alliance Memory	SRAM	12	Lead time and price trends up.
	DRAM	20	Lead time and price carry on increasing.
	Flash NOR, NAND	24	Lead time and pricing trends are up.
	eMMC	24	Lead time and price carry on increasing.
	ALL	12-24	**Pricing Strategy:** Maintains competitive pricing while gradually passing through cost increases from original manufacturers. **Lead Time:** Stable (12-24 weeks) supported by a multi-sourcing strategy and strategic inventory management. **Market Position:** Well positioned as an alternative supplier for legacy memory products (SDRAM, DDR, SRAM, Flash, etc.), ensuring strong supply continuity.
Cirrus	MS Audio	20-26	Slightly increased lead time.
	UK Audio	20-26	Slightly increased lead time.
	UK Mems	20-26	Slightly increased lead time.
Coilcraft	Shielded Power Inductors	12-20	Slightly increased lead time.
	RF inductor, ceramic core	12-20	Slightly increased lead time.
ISSI	SPI NOR flash	30-40	Lead time increasing.
	Parallel and Octal Flash	24	Lead time increasing.
	eMMC	N/A	ALLOCATION.
	DRAM	N/A	ALLOCATION.
	SRAM	14-24	Lead time slighly increasing.
	NAND	N/A	ALLOCATION.
	ALL	16+	**Pricing Strategy:** Limited price increases, primarily affecting automotive and industrial product lines. **Lead Time:** Medium (12–20 weeks), extending to 20–24 weeks for automotive-qualified and long-life products. **Market Position:** Long lifecycle-focused strategy with a strong presence in automotive, industrial and embedded markets. Supply continuity remains the priority rather than aggressive price increases.
Kingston	ALL	9-16	**Pricing Strategy:** Pricing adjustments reflect NAND and DRAM cost increases while maintaining a competitive position in the distribution market. **Lead Time:** Short to medium (8–16 weeks) for standard products; longer for Enterprise SSDs. **Market Position:** Strong product availability supported by a global distribution network and efficient inventory management. Highly responsive in the DRAM module and SSD markets.
Macronix	Serial and Parallel NOR	52	Lead time and pricing carry on going up.
	NAND	N/A	ALLOCATION. Prices still increasing.
	eMMC	52	ALLOCATION. Prices still increasing.
Marvell	ICs	30-42	Increased lead time.
	Boards	30-52	Increased lead time.

to be continued... ▶▶

/PRICE & LEAD TIME OVERVIEW - SUPPLIER SPECIFICS

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SUPPLIER	PRODUCT	LEAD TIME (WEEKS)	COMMENTARY
Microchip	ALL	10-40	Slightly increased lead time.
Micron	ALL	26+	**Pricing Strategy:** Continues implementing price increases across DRAM, NAND and SSD portfolios to maximize margins driven by AI-related demand. Limited pricing flexibility on spot business. **Lead Time:** Extended (26+ weeks), with priority allocation for strategic customers and long-term supply agreements for DDR4/LPDDR4. **Market Position:** Focus remains on high-value products (HBM, DDR5 and Enterprise SSDs). Allocation is still in place for selected product families.
MPS	ALL	32-52	Increased lead time.
Nexperia	ICs	8-26	While ICS capacity has improved, overwhelming orders globally lead to stretching lead-time.
	TSSOP/SO/VSSOP packages (major suffix PW, D, DC)	20-24	If Q4 orders have not yet been loaded, there may still be an opportunity to secure deliveries later in Fiscal Year 26-Q4.
	QFN packages (major suffix BQ, GU)	12-20	Lead times reduced to 12-20 weeks. Capacity still available (but potential full soon).
	MicroPak (major suffix GM, GS, GX, GT, GN, etc)	8-20	Lead times reduced to 8-20 weeks. Capacity still available (but potential full soon).
	Pico Gate (major suffix GW, GV)	12-16	Lead times remain at 12-16 weeks. Capacity still available (but potential full soon).
Nordic Semi	ALL	20-30	Slightly increased lead time.
Quectel	ALL	20-32	Increased lead time, partial allocation.
Renesas	Embedded - Processing	18-36	Lead times for Renasas Core are stable, when lead times for P&C, PTX and Analog keep increasing.
	Analog Mixed Signal	18-26	Lead times still increasing .
	High Performance Computing	26	Lead times remain stable.
	Power	18-26	Lead times still increasing .
Sandisk	ALL	N/A	Price trend will continue to be upward also in coming quarters.
	MLC, SLC, BICS3 and BICS4 technologies	N/A	ALLOCATION
	EM151 eMMC	12	They can support in good lead-time for BICS5 based products: EM151 - eMMC (and new one once it will be released), and some memory cards like SDSDQAD-064G.
	SSD	12-14	Except industrial SSD IX SN530, based on BICS4, is having longer lead-time, up to 20 weeks.
Semtech	ISM SX12** Family	26-30	Increased lead time.
	ISM SX13** Family	26-30	Increased lead time.
	Power Discrete	26-30	Increased lead time.
	TVS	16-20	Slightly increased lead time.
	Genum	26-30	Increased lead time.

SUPPLIER	PRODUCT	STATUS	COMMENTARY
NXP	Secure Edge Identification H2/25 Discontinuation	End of Life	202511028DN - Last Time Buy September 18th 2026.
NXP	Discontinuation for NXP Safety & Power Management FS26	End of Life	202512015DN - Last Time Buy December 30th 2026.
Renesas	Timing Products	Division sold to SiTime	Still available through Avnet Silica!
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 EOL orders as soon as possible.