/TRENDLINER

MARKET DATA AND PRICE LEAD TIMES - Q3 / 2025

AVNET SILICA

CONTENT

July 2025

/EXECUTIVE SUMMARY

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The semiconductor industry is starting to show signs of improvement in 2025, following a challenging year. Artificial intelligence continues to be a major growth driver. Especially in areas like Edge AI, where we're seeing growing adoption in IoT devices, automotive ADAS, and smart industrial systems. Demand from 5G, data processing, and generative AI applications is also helping fuel momentum.

On the supply chain side, things remain stable. Availability has improved across most product categories, and lead times have normalized. At the same time, we are seeing sustained investment in local manufacturing, with reshoring and nearshoring picking up due to geopolitical pressures and supportive funding programs.

While market growth is still modest overall, the European outlook is becoming more positive. Manufacturing indicators are stabilising, and confidence is slowly returning in key regions. This may be the early sign of a new replacement cycle starting.

This edition provides critical updates on pricing, lead times, and trends, equipping you with the insights needed to navigate the semiconductor industry in 2025 and beyond.

GLOBAL SEMI OUTLOOK BY REGION

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

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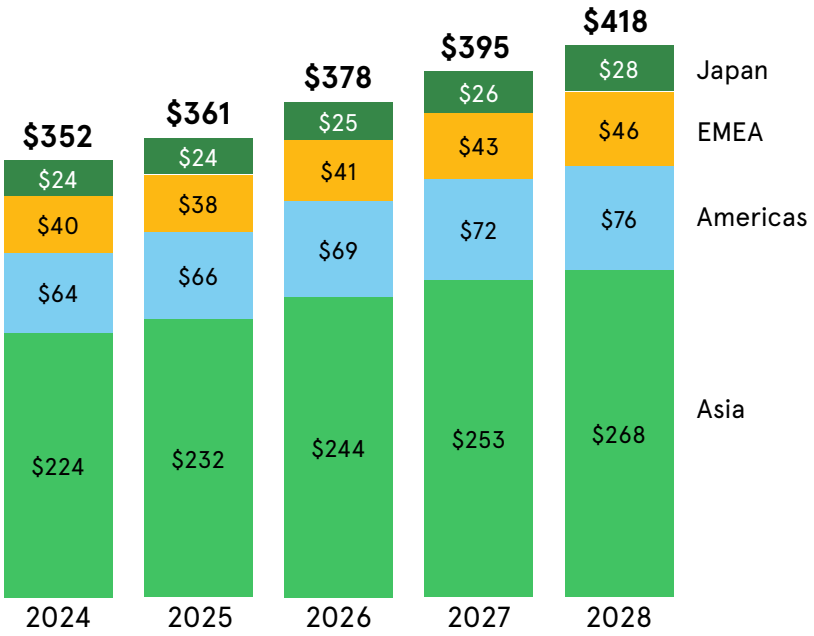
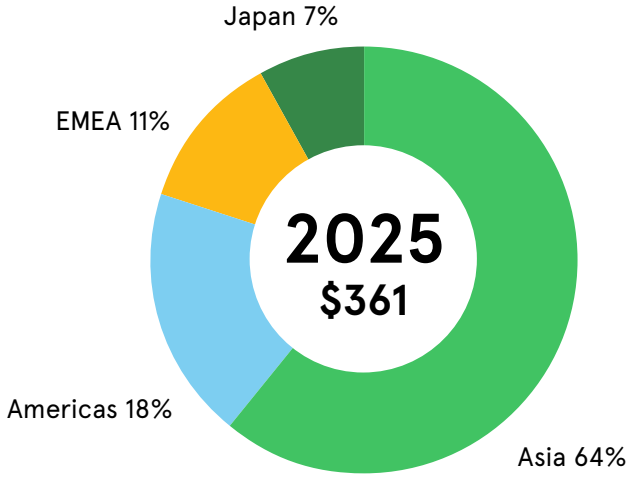


Region	2024	2025	2026	2027	2028	3-YR CAGR	3-YR Growth
EMEA	-12.2%	-3.4%	6.6%	5.8%	5.6%	6.0%	$7.4
Asia	-4.3%	2.7%	4.2%	5.1%	5.6%	5.0%	$10.3
Americas	0.2%	3.8%	4.8%	4.1%	5.6%	4.8%	$35.3
Japan	-17.0%	0.3%	2.0%	5.8%	5.1%	4.3%	$3.3
Grand Total	**-3.6%**	**2.5%**	**4.7%**	**4.6%**	**5.6%**	**4.9%**	**$56.3**



Source: Avnet estimate based on industry data – July 2025 | Data based on end customer

/2026 GLOBAL OUTLOOK

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- Market discovering new norm as served-semi ↑ 4.7% Y/Y to $378B
- AI data center demand continues strong driving leading edge technologies. AI at the edge drives incremental demand in mature and legacy nodes
- Demand from ADAS, smartphones, and data centers drives advanced chip growth – analysts project 14% CAGR in advanced fab capacity, supporting Logic & Microcomponents
- TSMC, Samsung, and Intel innovating sub-2nm nodes; incorporating gate-all-around (GAAFET) transistors for 30% better power efficiency and 3D stacking for modular designs
- Global inflation easing continues; IMF forecasts stable moderate rate cuts only in mid-2026; rates hovering around 4-4.5% into late 2025
- GDP growth at 2.7% for 2026
  - Major forecasters range from 2.5%-3.0%; United Nations, World Bank, IMF, etc.

Source: Avnet estimate based on industry data – July 2025 | Data based on end customer

/ECONOMIC SUMMARY FOR EUROPE

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The EU PMI fractionally improved 49.5 in June from 49.4 in the previous month, its highest level since June 2022. Manufacturing output expanded for the fourth month in row, supported by stable orders and continuing clearing up of the backlog. New orders stabilised, ending their 37-month decline, while export sales held steady. Despite this, employment and purchasing activity continued to decline which is what is holding back the PMI from breaking out about the 50 mark. Across the EU it was typical mixed bag of countries leading growth Greece and Ireland (Pharmaceutical Manf.), improving conditions in Netherlands and Spain, and contractions in France, Italy and Austria and Germany holding steady. Input costs and output prices both declined modestly, reflecting subdued demand, potentially some positive effect of the stronger Euro. Business confidence reached its highest level since February 2022, driven by optimism in Germany and Spain.

Source: Avnet estimate based on industry data – July 2025

EMEA SERVED SEMI VERTICAL MARKET GROWTH ($B)

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

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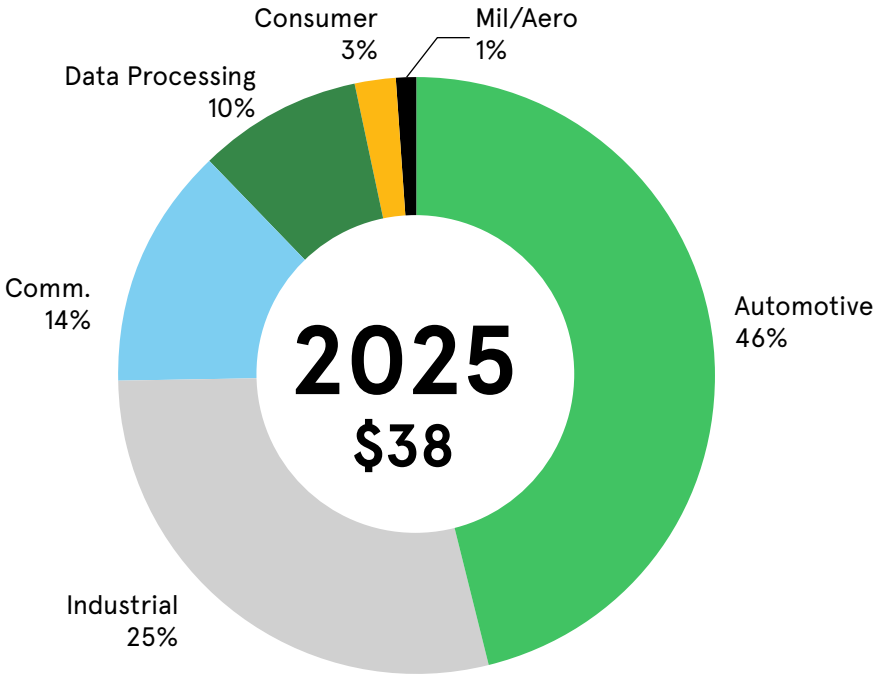

Vertical	2025
Automotive	$18
Industrial	$10
Communication	$5
Data Processing	$4
Consumer	$1
Mil/Aero	<$1

Source: Avnet estimate based on industry data – July 2025 | Data based on end customer

/TOP APPLICATION GROWTH EMEA

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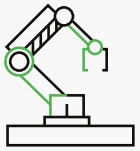
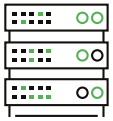
Application	Vertical	2025	2028	Δ	3-YR CAGR
ADAS	 Automotive	$4.3	$5.7	$1.3	9.4%
Electrified Powertrain		$3.3	$4.4	$1.1	10.2%
Automotive HPC		$1.5	$2.5	$1.1	20.0%
Transportation	 Industrial	$2.0	$2.7	$0.6	9.7%
Agriculture		$0.6	$1.0	$0.4	18.0%
Automation		$0.9	$1.1	$0.2	7.0%
Medical/Healthcare		$1.3	$1.6	$0.3	7.1%
PCs	 Data Processing	$1.7	$2.5	$0.8	13.2%
Other Military/Aerospace	 Mil/Aero	$0.5	$0.6	$0.2	9.9%
Smart Phones	 Communication	$1.1	$1.6	$0.4	11.6%

Source: Avnet estimate based on industry data – July 2025 | 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	=	14	=			16	=
SOD123 (F)	12	=	8	=	10	=	12-20	=	16	=
SOD323 (F)	12	=	8	=	10	=	12-20	=	16	=
SOD523	12	=	12	+	10	=	12-20	=	16	=
SOT23	12-20	=	8	=	10	=	12-20	=	16	=
SOT323 (SC70)	12	=	8	+	12	=	12-20	=	20	+
SOT363 (SC88)	12	=	8-12	+	10	=			16	=
SOT89	12	=	8	=	14	=			16	=
SOT223	12	=	12	+	12	=	12-20	=	16	=
SMA -SOD123W	12	=	16	+	11	=	12-25	=	16	=
SMB -SOD128W	12	=	16	+	12	=	12-25	=	16	=
SMC	12	=			12	=	12-25	=	16	=
LFPAK (Mosfet / Rectifier)	12-14	=	13-16	=	12-14	=	15-25	=	20-25	=
SO8 (Mosfet)	12	=	12	=	26	=	16-18	=	25	=
TO220	12	=	16	=	18-20	=	16-18	=	25	=
TO247	12	=	12	=	18-20	=	16-18	=	25	=
DPAK	12	=	12-14	+	24	=	16-26	=	20-25	=
D2PAK	12	=	16	+	26	=	16-26	=	25	=
DFN's (Small Signal)	12	=	8	=	12	=	12-20	=	16	=

/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	+			12-52	=
DFN (All)					26+	=	16-52	=
DPAK			12-14	+			16-52	=
PDIP	12	=						
SO14	12	=	8-12	+	9-16	=	10-26	=
SO16	12	=	8-12	+	9-16	=	10-26	=
SO20	12	=	8-12	+	9-16	=	10-26	=
SO24	16	=	8-12	+	9-16	=	10-26	=
SO8	12	=	12	=	9-16	=	10-26	=
SOT23-5/SOT23-6	12-16	=					10-26	=
SOT363/353 (SC70/SC88)	12	=					10-26	=
TO220							10-26	=
TSSOP14	12	=	8-12	+	9-16	=	10-26	=
TSSOP16	12	=	8-12	+	9-16	=	10-26	=
TSSOP20	12	=	8-12	+	9-16	=	10-26	=
TSSOP24	12	=	8-12	+	9-16	=	10-26	=
TSSOP48			8-12	+	9-16	=		
TSSOP56			8-12	+	9-16	=		

/PRICE & LEAD TIME OVERVIEW - MARKET OVERVIEW

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

OPTO		PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)	COMMENTS
LEDs	Low Power	→	→	2-8	
	Mid Power	→	→	9-16	
	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		→	↑	16+	

/PRICE & LEAD TIME OVERVIEW - MARKET OVERVIEW

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MEMORY	PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)	COMMENTS
Flash – NOR	→	→	9-16	After a period of volatility and inventory corrections, most Flash types (NAND & NOR) are stabilizing, but leadtimes have extended in 2025.
Flash – NAND	↑	→	9-16	NAND prices remain volatile, with upward pressure expected from constrained supply and data-center demand. Micron announced 10–15% price increases for NAND (and DRAM) through 2026, citing production cuts from Samsung & SK Hynix (~10%) and rising AI demand.
eMMC	→	→	16+	eMMC prices are declining or stabilizing, offering strong negotiating leverage. Lead times are still long (up to ~20 weeks)
EEPROM	→	→	16+	Slight increases on high-grade/higher-density units~12–20 weeks (general); similar for embedded automotive industrial grade.
DRAM	↑	→	DDR4/LPDDR: 9-16 DDR4/DDR5: 16+	Industry-wide price increases in the past two months. Allocations and long lead times are now common. +3–8% (PC DRAM), +0–5% (mobile); spot ~+22%; +10–15% contract increases announced ~8–20 weeks, longer for AI/server DRAM types.
SRAM	→	→	16+	SRAM continue to ride a wave of demand from AI, 5G, IoT, and automotive growth. Flat to slight increases (5–10%) in niche segments~12–20 weeks overall; longer for AI/high-density SKUs.
Solid State Drives	↑	↑	9-16	

PROGRAMMABLE LOGIC	PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)	COMMENTS
	→	→	16+	Leadtimes starting to increase on specific technologies, please provide us with long term visibility to ensure supply.

MOS MICRO LOGIC	PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)	COMMENTS
MPU	→	→	16+	
MCU – 8 Bit & Lower	→	↑	16+	
MCU – 16 Bit	→	→	16+	
MCU – 32 Bit & Higher	→	↑	16+	
MCU Total	→	↑	16+	Leadtimes stretching on specific product families, please extend your purchasing window to maintain supply chain.
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	→	→	9-16	

/PRICE & LEAD TIME OVERVIEW - SUPPLIER SPECIFICS

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SUPPLIER	PRODUCT	LEAD TIME (WEEKS)	COMMENTARY
Alliance Memory	SRAM, DRAM	4-6	Prince and lead time increasing for DRAM.
	Flash NOR, NAND	8-16	Lead times are increasing.
	eMMC	12-16	Lead times are increasing.
Cirrus	MS Audio	12-26	Stable lead times.
	UK Audio	12-26	Stable lead times.
	UK Mems	12-26	Stable lead times.
Coilcraft	Shielded Power Inductors	6-10	Stable lead times.
	RF inductor, ceramic core	6-10	Stable lead times.
ISSI	Flash NOR, NAND.	10-14	Stable lead times.
	eMMC	12-24	Focus on longevity and sustainable offering.
	DRAM	10-24	Lead time increasing. Market turbulence in legacy DRAM expected to increase throughout year.
	SRAM	8-10	Stable situation.
Macronix	NOR Flash, SLC Nand only	8-12	Prices increasing for Flash Nand.
Marvell	ICs	26	Stable lead times.
	Boards	20-52	Stable lead times.
Microchip	All	10-40	Stable lead times.
MPS	All	16-28	Stable lead times.
Nexperia	Small signal	18-16	Depending on packages - such as SMA and SMB - we start seing lead time increases.
	Power Mosfets	12-16	Lead times for DPAK and D2PAK increasing.
	Logic	8-16	Lead times for almost logic packages have been increased by 4 weeks.
Nordic Semi	All	16-26	Stable lead times.

to be continued... ▶▶

/PRICE & LEAD TIME OVERVIEW - SUPPLIER SPECIFICS

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SUPPLIER	PRODUCT	LEAD TIME (WEEKS)	COMMENTARY
NXP	SOI3 Can & Lin products	8	New SOI3+ versions available in stock (TJA1042 / TJA1044 / TJA1057 / TJA1021 & TJA1028.
Quectel	All	10-16	Stable lead times.
Renesas	Embedded Processing	14-18	Stable lead times.
	High Performance Computing	24	Stable lead times.
	Analog and Connectivity	12-18	Stable lead times.
	Power	12-18	Stable lead times.
Sandisk	eMMC	12-14	Prices keep growing and we expect them to continue to rise throughout 2025. Tight supply, especially on old Technology Nodes like MLC or SLC (very hard to support new projects). A bit better on 3D Nand, but still tight.
	SSD - Solid State Drives	8	Prices are increasing and are expected to rise throughout 2025.
Semtech	ISM SX12** Family	10-16	Stable lead times.
	ISM SX13** Family	10-16	Stable lead times.
	Power Discrete	10-20	Stable lead times.
	TVS	12-16	Stable lead times.
	Genum	22-28	Stable lead times.

SUPPLIER	PRODUCT	STATUS	COMMENTARY
Alliance	DDR4/LPDDR4	**New!**	Offer comprehensive Samsung/Micron DRAM EOL direct cross reference parts with good availability & Pricing
ISSI	DDR4/LPDDR5	**New!**	Offer comprehensive Samsung/Micron DRAM EOL direct cross reference parts with good availability & Pricing
NXP	Selected legacy Microprocessors	End of LIfe	PDN 202412016DNU01 - Last Time Buy December 16th, 2025. Please load your orders as soon as possible.
NXP	Selected microcontrollers due to low volume and manufacturing capabilities	End of life	PDN 20250617DN - Last Time Buy December 20th, 2025. Please secure demand as soon as possible.
Renesas	Selected MCUs	End of life with replacement - Move to a "full box" part number	EOL SAF-B-24-0034 - Last Time Buy is September 30th, 2025, please migrate to the replacement device as soon as possible.
Renesas	"Native" Echelon products	End of Life	PCN # 075 - Last time buy is September 14th, 2025 - Subject to material availability, please load your orders as soon as possible to secure supply. No direct replacement.
Renesas	Selected Renesas MCUs & SRAMs	End of Life	EOL250007 - 2 "waves"of Last Time buy : October 31st, 2025 and December 31st, 2025. Please load your orders as soon as possible.
Renesas	Transphorm product	**New!**	Transphorm line card now available at Avnet Silica.