

## MARKET DATA AND PRICE LEAD TIMES - Q4 / 2025

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# /EXECUTIVE SUMMARY

The global semiconductor industry is showing encouraging signs of improvement in 2025, with served markets stabilising and growth expected to continue at a more predictable pace through 2028. Artificial intelligence remains the key growth driver, sustaining strong demand for AI-related chips with a projected 23% CAGR. High-performance applications such as servers, PCs, and 5G infrastructure account for most of this demand, while Edge AI continues to gain traction across automotive ADAS, industrial automation, and connected consumer devices.

On the supply chain side, availability remains stable, and lead times have normalised across most product categories, although the Nexperia situation creates critical vulnerabilities in essential chip supplies. The industry continues to prioritise resilient, localised, and diversified sourcing strategies as reshoring and nearshoring efforts expand under ongoing geopolitical and funding pressures.

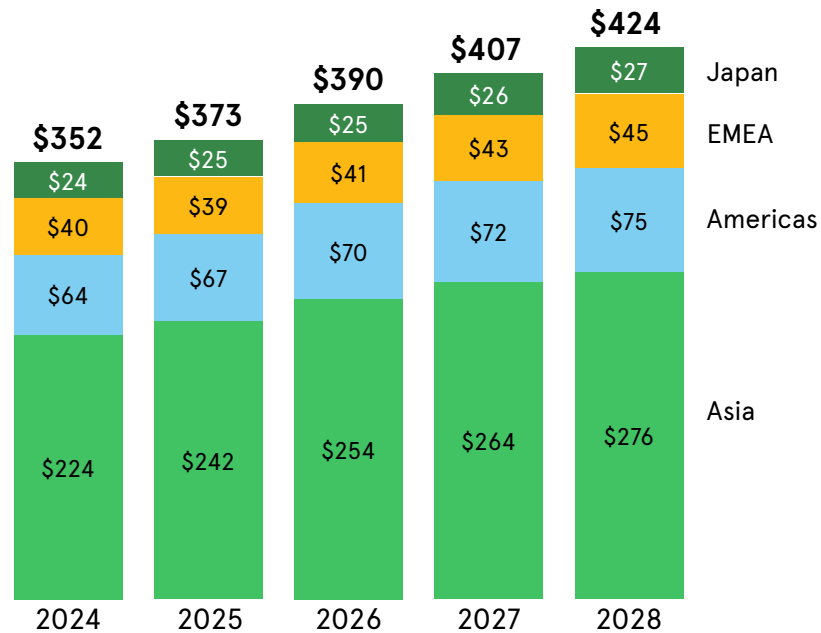
Indirect revenue channels are also growing faster than direct, reflecting evolving distribution dynamics and stronger demand responsiveness.

In Europe, momentum remains fragile. Weaker new orders and cautious purchasing activity continue to weigh on overall sentiment, although production volumes remain positive, and cost pressures have eased. While mid-sized economies such as the Netherlands and Spain show modest expansion, larger markets including Germany and France continue to lag.

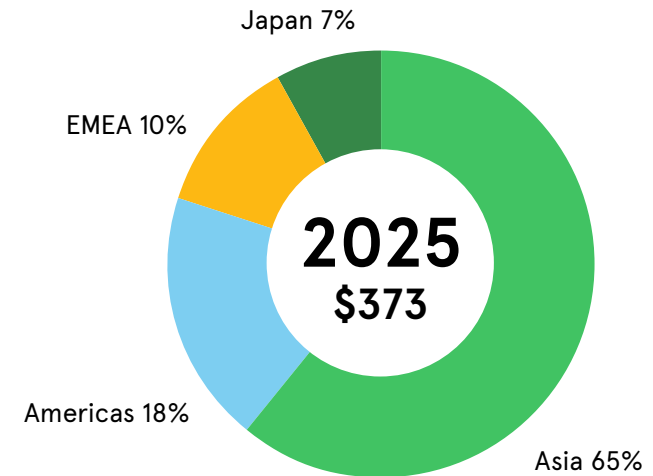
As always, this edition provides the latest **price and lead time overview**, helping you navigate current market conditions and plan strategically for the quarters ahead.

# 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	-12.2%	-2.0%	6.1%	5.1%	4.6%	5.3%	\$6.5
Asia	0.2%	7.9%	5.1%	4.1%	4.6%	4.6%	\$34.8
Americas	-4.3%	4.9%	3.9%	3.6%	3.1%	3.5%	\$7.4
Japan	-17.0%	1.1%	1.9%	4.8%	3.8%	3.5%	\$2.7
Grand Total	-3.6%	5.8%	4.8%	4.1%	4.3%	4.4%	\$51.4



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

# /2026 GLOBAL OUTLOOK

- Market discovering new norm as served-semi  $\uparrow$  4.8% Y/Y to \$390B
- 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
- CME projections pointing to U.S. rates normalizing around 2.75–3.25%
- GDP growth at 2.7% for 2026
  - Major forecasters range from 2.4%–3.1%; United Nations, World Bank, IMF, etc.

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

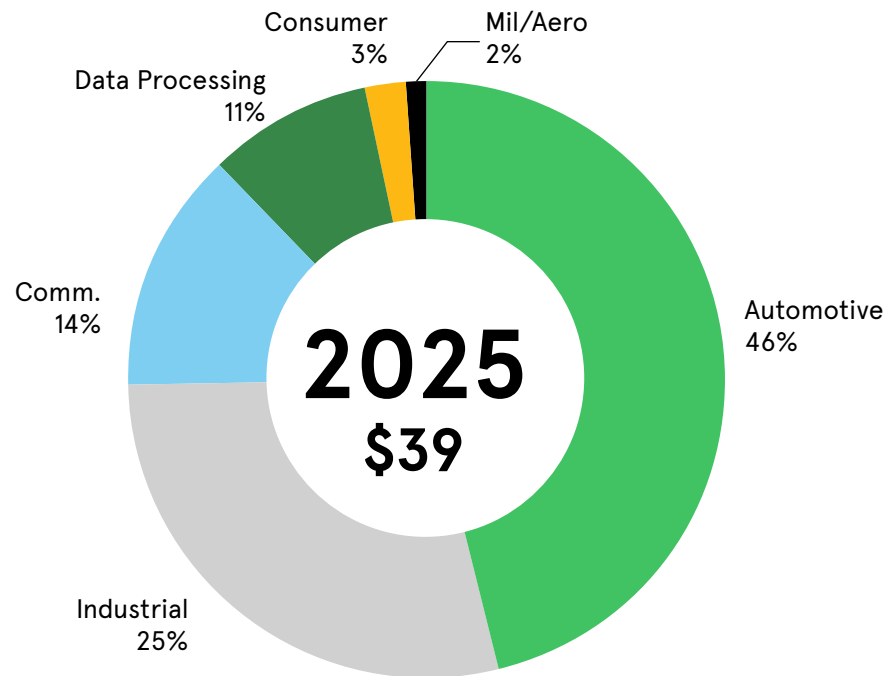
# /EUROPEAN MANUFACTURING PMI – SNAPSHOT

September's PMI results showed a slight setback, as the European manufacturing sector failed to build on the positive momentum seen over the summer. The Eurozone PMI slipped to 49.8 from 50.7 in the previous month, signalling a mild contraction in factory activity. The decline was largely driven by a sharper drop in new orders, which fell at the fastest rate in six months and weighed on business confidence. In response, many manufacturers intensified cost-control measures, including job reductions and tighter purchasing activity. Stock levels continued to decline as companies remained cautious. There were some positive indicators: production volumes still grew, albeit at a slower pace, and input prices continued to ease for the fifth consecutive month. Among EU countries, mid-sized economies such as the Netherlands and Spain showed expansion, while the larger economies remained in contraction. Looking ahead, manufacturers remain cautiously optimistic, though expectations for future output are at their weakest since April, reflecting persistent headwinds from tariffs, political uncertainty, and high energy costs.

Source: Avnet estimate based on industry data – Oct 2025

# / EMEA SERVED SEMI VERTICAL MARKET GROWTH (\$B)


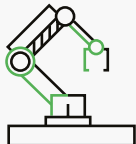
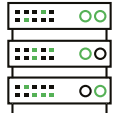

(EXCLUDES DRAM, FLASH, MPU COMPUTE, GPU, AI PROCESSORS)



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

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

# /TOP APPLICATION GROWTH EMEA

Application	Vertical	2025	2028	Δ	3-YR CAGR	
ADAS	 Automotive	\$4.4	\$5.8	\$1.4	9.8%	<div></div>
Electrified Powertrain		\$3.4	\$4.4	\$1.0	9.4%	<div></div>
Automotive HPC		\$1.4	\$2.0	\$0.7	13.9%	<div></div>
Transportation	 Industrial	\$2.0	\$2.6	\$0.6	8.7%	<div></div>
Agriculture		\$0.6	\$1.0	\$0.4	17.4%	<div></div>
Automation		\$0.9	\$1.1	\$0.2	6.3%	<div></div>
Medical/Healthcare		\$1.3	\$1.6	\$0.3	6.4%	<div></div>
PCs	 Data Processing	\$1.8	\$2.5	\$0.7	13.9%	<div></div>
Servers		\$0.8	\$1.0	\$0.2	9.4%	<div></div>
Smart Phones	 Communication	\$1.1	\$1.5	\$0.4	11.3%	<div></div>

Source: Avnet estimate based on industry data – Oct 2025 | 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 )	16+	+	N/A	N/A	16+	+	12-16	=	16+	+
SOD323 ( F )	16+	+	N/A	N/A	16+	+	12-16	=	16+	+
SOD523	16+	+	N/A	N/A	16+	+	12-16	=	16+	+
SOT23	16+	+	N/A	N/A	16+	+	12-16	=	16+	+
SOT323 ( SC70 )	16+	+	N/A	N/A	16+	+	12-16	=	16+	+
SOT363 ( SC88 )	16+	+	N/A	N/A	16+	+			16+	+
SOT89	16+	+	N/A	N/A	16+	+			16+	+
SOT223	16+	+	N/A	N/A	16+	+	12-16	=	16+	+
SMA –SOD123W	14-16	+	N/A	N/A	14	+	12-16	=	16+	+
SMB –SOD128W	14-16	+	N/A	N/A	14	+	12-16	=	16+	+
SMC	12	=			14	+	12-16	=	16+	+
LFPK ( Mosfet / Rectifier )	16+	=	N/A	N/A	14-16	+	14-16	=	24	+
SO8 ( Mosfet )	12	=	N/A	N/A	26	-	14-16	-	30	+
TO220	12	=	N/A	N/A	18-20	=	12-16	=	14	=
TO247	16+	=	N/A	N/A	18-20	=	14-16	=	14	=
DPAK	12	=	N/A	N/A	24	=	10-26	=	14	=
D2PAK	12	=	N/A	N/A	26	=	10-26	=	16+	+
DFN's ( Small Signal )	16+	+	N/A	N/A	14	+	12-16	=	10	+

\* N/A due to current circumstance at Nexperia



# /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			12-35	+
DFN (All)					26+	+	16-52	=
DDPAK			N/A	N/A			16-52	=
PDIP	12-20	+						
SO14	12	+	N/A	N/A	16+	+	9-20	+
SO16	12	+	N/A	N/A	16+	+	9-20	+
SO20	12	+	N/A	N/A	16+	+	9-20	+
SO24	16	=	N/A	N/A	16+	+	9-20	+
SO8	12	=	N/A	N/A	16+	+	9-20	+
SOT23-5/SOT23-6	12-16	=					9-20	+
SOT363/353 (SC70/SC88)	12	=					9-20	+
TO220	12	=					9-20	+
TSSOP14	12	+	N/A	N/A	16+	+	9-20	+
TSSOP16	12-16	+	N/A	N/A	16+	+	9-20	+
TSSOP20	12	+	N/A	N/A	16+	+	9-20	+
TSSOP24	12	+	N/A	N/A	16+	+	9-20	+
TSSOP48			N/A	N/A	16+	+		
TSSOP56			N/A	N/A	16+	+		

\* N/A due to current circumstance at Nexperia

# /PRICE & LEAD TIME OVERVIEW - MARKET OVERVIEW

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	→	→	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	→	↑	16+	

# /PRICE & LEAD TIME OVERVIEW - MARKET OVERVIEW

MEMORY	PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)	COMMENTS
Flash <div></div>	NOR →	→	9-16	Expect mild to moderate upward pressure on NOR pricing, especially for parts with lower demand or nearing obsolescence. Lead times likely somewhat extended.
	NAND ↑	↑	9-16	The upward pricing trend for NAND is likely to persist through the rest of 2025, with seasonal declines suppressed or absent. For high-stack, high-capacity, or leading-edge NAND products, expect more extreme price pressures and tight allocation. Lead times will likely remain stretched, especially for prioritized / high-performance segments.
eMMC	↑	→	16+	Expect moderate to decently strong upward pressure on eMMC pricing through 2025, particularly in Q4. Lead times will remain stretched especially for newer densities / more advanced nodes.
EEPROM	→	→	16+	Expect modest upward pressure on EEPROM pricing in 2025. Lead times likely to remain above “ideal” norms, but stable and manageable for most standard product lines. Pressure points: if demand in automotive / IoT sectors surges, or supplier allocations tighten, specialized EEPROM parts may face longer lead times or premium pricing.
DRAM	↑	↑	16+	Expect continued upward pricing momentum in DRAM, especially for high-end, high-performance variants. Spot and contract price spreads may widen. Lead times likely to stay high, especially for prioritized product lines (e.g. server DRAM, HBM) – which may see lead times even more stretched compared to consumer DRAM.
SRAM	→	↑	16+	Expect moderate upward pressure on SRAM pricing, especially for newer/smaller nodes or high-speed variants. Lead times likely remain elevated (longer than historical averages) in many segments of SRAM.
Solid State Drives	↑	↑	16+	

PROGRAMMABLE LOGIC	PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)	COMMENTS
	→	↑	16+	We need long term visibility to ensure supply.

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	→	↑	9-16	

# /PRICE & LEAD TIME OVERVIEW - SUPPLIER SPECIFICS

SUPPLIER	PRODUCT	LEAD TIME (WEEKS)	COMMENTARY
Alliance Memory	SRAM, DRAM	4-12	Lead times for SDRAM, DDR1/2/3 and LPDDR1/2 remain stable when DRAM DDR4 and LPDDR4/X are increasing.
	Flash NOR, NAND	8-16	Stable lead times for NOR when increasing for NAND.
	eMMC	12-20	Lead times are still increasing. Very volatile.
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.	10-20	Stable lead times.
	eMMC	18-20	Increasing prices and lead times. Long term support on 8GB MLC eMMC.
	DRAM	8-34	Lead time increasing. Increasing demand on LP/DDR4 due to other suppliers de-focusing.
	SRAM	8-12	Stable situation.
Macronix	Flash NOR and NAND	20	Lead times are increasing.
	eMMC	25-30	Lead times are increasing.
Marvell	ICs	26	Stable lead times.
	Boards	20-52	Stable lead times.
Microchip	All	10-40	Stable lead times.
Micron	All	16+	<p>"Pricing Trend: Strong upward trajectory. Micron is pushing 20-30% DRAM price hikes (and potentially more in selected segments) and repositioning pricing discipline. Lead Times: Extended and more volatile than normal. Some SKUs not even being quoted suggests very tight supply. High-end / advanced memory lines will see the longest lead times.</p> <p>Strategic Strengths: Micron has strong demand tailwinds from AI / data centre, a technology roadmap in DRAM / HBM / next-gen products, and momentum from recent solid financial results."</p>

to be continued... >>

# /PRICE & LEAD TIME OVERVIEW - SUPPLIER SPECIFICS

SUPPLIER	PRODUCT	LEAD TIME (WEEKS)	COMMENTARY
MPS	All	16-28	Stable lead times.
Nordic Semi	All	16-26	Stable lead times.
Quectel	All	10-16	Stable lead times.
Renesas	Embedded Processing	14-18	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.
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.

# /PRICE & LEAD TIME OVERVIEW - PRODUCT LIFE NEWS

SUPPLIER	PRODUCT	STATUS	COMMENTARY
<b>NXP</b>	Selected legacy Microprocessors	End of life	PDN 202412016DNU01 - Last Time Buy December 16th, 2025. Please load your orders as soon as possible.
<b>NXP</b>	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.
<b>Renesas</b>	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 as soon as possible to ensure supply.
<b>Renesas</b>	Selected IDT native parts	End of life	PLC250016 - Last time Buy November 30th, 2025.
<b>Renesas</b>	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.
<b>Renesas</b>	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.