

MARKET DATA AND PRICE LEAD TIMES - Q2 / 2025

CONTENT

Executive summary	2
Global semi market outlook	3
Global outlook	4
Economic summary Europe	5
EMEA vertical market growth	6
Top application growth	7
Price & lead time overview	8
- Discretes.....	8
- Analog & Logic	9
- Market Overview	10
- Supplier Specifics.....	12
- Product Life News.....	14



/EXECUTIVE SUMMARY

We are seeing strong momentum in artificial intelligence with demand for AI-related chips. Sectors like Wireless Communication and Data Processing are also driving the market, and “AI at the Edge” is creating exciting opportunities especially in Smart Industry and here in particular the areas of Industrial Robots and Cobots.

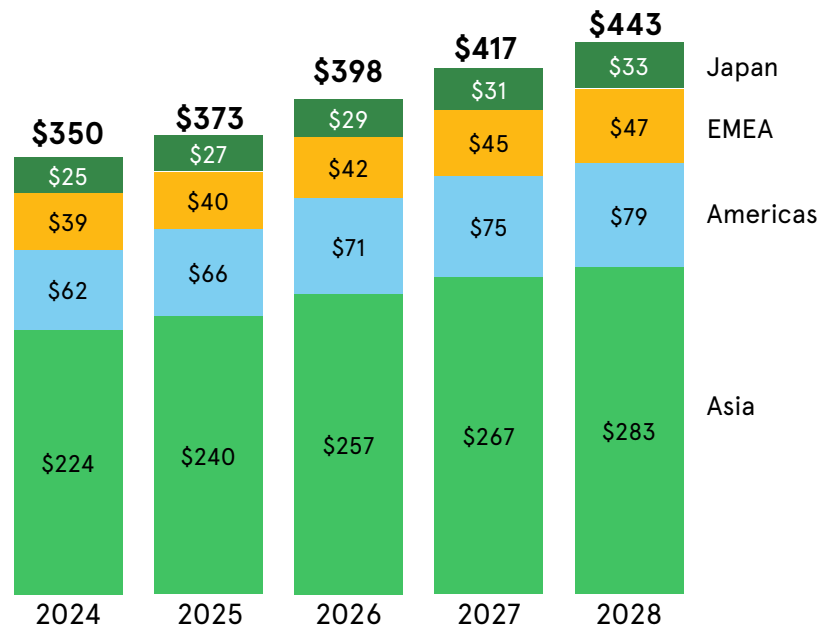
On the supply chain side, availability is dependent on the product group and technology. Memory components are already back on allocation and some market players have adjusted their prices recently. High-power products are still strongly demanded and will remain essential for multiple subsegments in the future.

At same time order levels are still relatively low. The Industrial and EMS customers have started to place orders again, as inventory levels have been burned over the past quarters. These orders are mainly placed on current lead times.

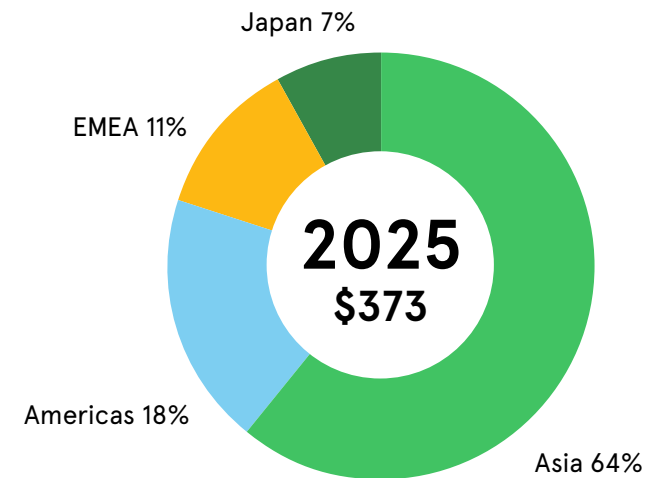
This edition provides critical updates on pricing, lead times, and trends, equipping you with the insights needed to navigate the semiconductor industry in 2025 and beyond.

GLOBAL SEMI OUTLOOK BY REGION

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



Region	2024	2025	2026	2027	2028	3-YR CAGR	3-YR Growth
EMEA	-14.0%	3.2%	6.3%	5.4%	6.0%	5.9%	\$7.5
Japan	-14.1%	5.8%	6.4%	6.8%	6.8%	6.7%	\$5.8
Asia	0.1%	7.3%	6.9%	4.0%	6.1%	5.7%	\$43.1
Americas	-7.0%	5.9%	6.9%	5.8%	6.2%	6.3%	\$13.3
Grand Total	-4.1%	6.5%	6.8%	4.7%	6.1%	5.9%	\$69.6



Region	2025
Asia	\$240
Americas	\$66
EMEA	\$40
Japan	\$27

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

/2026 GLOBAL OUTLOOK

- Market continues momentum as served-semi ↑ 6.8% Y/Y to \$398B
- Continued strong demand driven by generative AI and advanced computing workloads, pushing innovation in specialized processors, GPUs, and accelerators
- Power electronics, sensors, and connectivity solutions to sustain demand as the EV transition continues and ADAS grows in popularity
- Prolonged interest rate reduction efforts finally cool, providing a spark for investment opportunities
- Expanded investment in localised semiconductor manufacturing, driven by continued geopolitical pressures
- WW GDP latest forecast ↑ 2.7% Y/Y



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

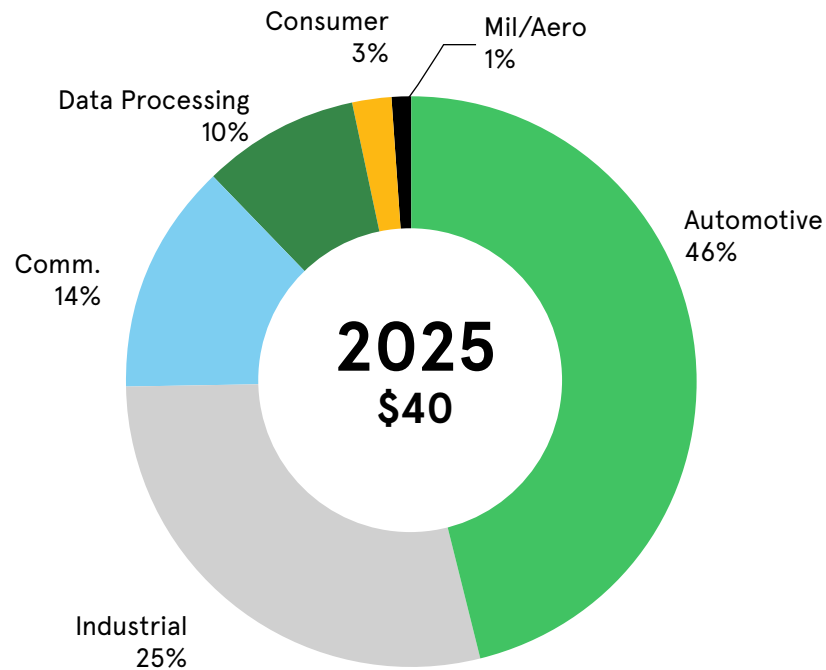
/ECONOMIC SUMMARY FOR EUROPE

The EU PMI continued its three-month trend, climbing to 48,6, still negative but pointing towards a more moderate decline. The manufacturing output component of the index actually achieved 50,5, which moved into the growth column for the first time in over two years. That said, some of this activity could have been front-loading ahead of the US tariffs. At the country level France and Germany had their best numbers in 31 months and 26 months respectively. Italy continued to slow. Despite a renewed increase in factory output across the Euro area, new factory orders fell in March, continuing a trend seen for almost three years. Eurozone factories made further cuts to their workforce numbers at the end of the first quarter amid signs of excess capacity, although the rate of job shedding cooled down from February's record. Eurozone manufacturers reduced their quantities of purchases at the end of the first quarter, with pre-production inventories shrinking at a slightly faster pace than in February. Business optimism however had dipped to a three-month low.

Source: Avnet estimate based on industry data – Apr 2025

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

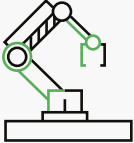
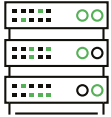
(EXCLUDES DRAM, FLASH, MPU COMPUTE, GPU, AI PROCESSORS)



Vertical	2025
Automotive	\$19
Industrial	\$10
Communication	\$6
Data Processing	\$4
Consumer	\$1
Mil/Aero	<\$1

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

/TOP APPLICATION GROWTH EMEA

Application	Vertical	2024	2027	Δ	3-YR CAGR	
Electrified Powertrain	 Automotive	\$3.3	\$4.4	\$1.3	11.0%	
ADAS		\$3.6	\$4.6	\$1.0	8.0%	
Infotainment and Cluster		\$3.2	\$3.3	\$0.1	1.2%	
Automotive HPC		\$1.2	\$2.7	\$1.0	14.9%	
Transportation	 Industrial	\$2.1	\$2.9	\$1.3	17.4%	
Agriculture		\$0.5	\$0.9	\$0.4	18.4%	
Automation		\$1.0	\$1.2	\$0.3	9.4%	
Medical/Healthcare		\$1.3	\$1.4	\$0.2	5.9%	
PCs	 Data Processing	\$1.6	\$2.5	\$0.8	13.3%	
Other Military/Aerospace	 Mil/Aero	\$0.4	\$0.5	\$0.2	12.7%	

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

/PRICE & LEAD TIME OVERVIEW – DISCRETE

Main packages	Diodes Inc		Nexperia		onsemi		STMicroelectronics		Panjit	
	LT	LT trend	LT	LT trend	LT	LT trend	LT	LT trend	LT	LT trend
SOD80			8	=	14	=			10	=
SOD123 (F)	9-16	+	8	=	10	=	12-16	=	12	=
SOD323 (F)	9-16	+	8	=	10	=	12-16	=	12	=
SOD523	9-16	+	8	=	10	=	12-16	=	12	=
SOT23	16+	+	6-8	=	10	=	12-16	=	12	=
SOT323 (SC70)	9-16	+	6	=	12	=	12-16	=	12	=
SOT363 (SC88)	9-16	+	6	=	10	=			12	=
SOT89	9-16	+	8	=	14	=			12	=
SOT223	9-16	+	8	=	12	=	12-16	=	12	=
SMA -SOD123W	9-16	+	8	=	11	=	12-16	=	12	=
SMB -SOD128W	9-16	+	8	=	12	=	12-16	=	12	=
SMC	9-16	+			12	=	12-16	=	12	=
LFPK (Mosfet / Rectifier)	9-16	+	13-16	=	12-14	=	14-16	-	24	=
SO8 (Mosfet)	9-16	+	12	=	26	-	14-16	-	30	=
TO220	9-16	+			18-20	=	12-16	-	14	=
TO247	9-16	+	12	=	18-20	=	16-18	-	14	=
DPK	9-16	+	13	=	24	=	10-26	-	14	=
D2PAK	9-16	+	13	=	26	=	10-26	-	16	=
DFN's (Small Signal)	9-16	+	8	=	12	=	12-16	=	10	=

/PRICE & LEAD TIME OVERVIEW - ANALOG AND LOGIC

Main packages	Diodes Inc		Nexperia		onsemi		STMicroelectronics	
	LT	LT trend	LT	LT trend	LT	LT trend	LT	LT trend
D2PAK			10-12	=			12-52	=
DFN (All)					26+	=	16-52	=
DPAK			10-12	=			16-52	=
PDIP	9-16	+						
SO14	9-16	+	6-8	=	9-16	=	9-20	=
SO16	9-16	+	6-8	=	9-16	=	9-20	=
SO20	9-16	+	6-8	=	9-16	=	9-20	=
SO24	9-16	=	6-8	=	9-16	=	9-20	=
SO8	9-16	+	12	=	9-16	=	9-20	=
SOT23-5/SOT23-6	9-16	+					9-20	=
SOT363/353 (SC70/SC88)	9-16	+					9-20	=
TO220							9-20	=
TSSOP14	9-16	+	8	=	9-16	=	9-20	=
TSSOP16	9-16	+	8	=	9-16	=	9-20	=
TSSOP20	9-16	+	8	=	9-16	=	9-20	=
TSSOP24	9-16	+	8	=	9-16	=	9-20	=
TSSOP48			8	=	9-16	=		
TSSOP56			8	=	9-16	=		

/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	→	→	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				
Advanced	→	↑	16+	

/PRICE & LEAD TIME OVERVIEW - MARKET OVERVIEW

MEMORY	PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)	COMMENTS
Flash	NOR →	→	9-16	
	NAND →	↑	16+	
eMMC	↑	↑	16+	
EEPROM	→	→	9-16	
DRAM	↑	↑	16+	
SRAM	→	→	2-8	
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.

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

MOS MICRO LOGIC	PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)	COMMENTS
MPU	→	→	16+	
MCU	8 Bit & Lower →	→	9-16	
	16 Bit →	→	16+	
	32 Bit & Higher →	↑	16+	
MCU Total	→	↑	16+	Leadtimes increasing on specific product families, please extend your purchasing window.
Automotive MCU	→	→	26+	
DSP	→	→	26+	

/PRICE & LEAD TIME OVERVIEW - SUPPLIER SPECIFICS

SUPPLIER	PRODUCT	LEAD TIME (WEEKS)	COMMENTARY
Alliance Memory	SRAM, Flash	8	Stable lead time and pricing.
	DRAM Modules	8-10	Stable lead time and pricing.
Cirrus	MS Audio	12-26	Stable lead time.
	UK Audio	12-26	Stable lead time.
	UK Mems	12-26	Stable lead time.
Coilcraft	Shielded Power Inductors	6-10	Stable lead time.
	RF inductor, ceramic core	6-10	Stable lead time.
ISSI	Flash - NOR	10-12	Stable lead time.
	Flash - NAND	10-12	Stable lead time.
	eMMC	8-10	Stable lead time.
	DRAM	8-12	Stable lead time.
	SRAM	8-10	Stable lead time.
Marvell	ICs	26	Stable lead time.
	Boards	20-52	Stable lead time.
Microchip	All	10-40	Stable lead time.
Micron	Flash - NOR	8-10	Please provide long-term forecasts. Forecasts/Orders are key for planning demand properly.
	Flash - NAND	8-18	Lead time increasing. SLC 8-10 weeks and Usd 16-18 weeks. Plse provide long-term forecasts to secure supply.
	eMMC	18-20	Lead time increasing. Please provide long-term forecasts. Forecasts/Orders are key for planning demand properly.
	Solid State drives	18-20	Lead time increasing.Please provide long-term forecasts. Forecasts/Orders are key for planning demand properly.
	LPPDR4-5 / DDR4-5	20-24	HBM Capacity constraint leading to price increase. Please provide long-term forecasts. Forecasts/Orders are key for planning demand properly.
	Legacy	4-6	Pricing opportunity driven by high availability.

to be continued... >>

/PRICE & LEAD TIME OVERVIEW - SUPPLIER SPECIFICS

SUPPLIER	PRODUCT	LEAD TIME (WEEKS)	COMMENTARY
MPS	All	16-28	Stable lead time.
Nexperia	SMx Power Diodes rectifiers (SMA/SMB/SMC)	8	Additional parts introduced - Competitive pricing.
	HCS Logic family	8	HCS replacing HC(T) family : Immune to slow/falling signals + superior noise rejection
Nordic Semi	All	16-26	Stable lead time.
Quectel	All	10-16	Stable lead time.
Renesas	Embedded Processing	12-18	Stable lead time.
	High Performance Computing	24	Stable lead time.
	Analog and Connectivity	12-18	Slight improvment for various Analog devices.
	Power	12-18	Slight improvment for several Power devices.
	RF business	N/A	Renesas has divested its RF business (RF/mmWave front-ends, WiGigmodems, etc...) to company Axiro (part of the Murugappa Group in India). Avnet Silica will not be distributing Axiro products.
	PWR_DPS legacy product family	N/A	Major price increase across this family, effective May 1st 2025.
Sandisk	eMMC	10-12	Lead time increase leading to price increase. Prices expected to increase all through CY2025. Some tightness during CY2025-Q2, probably better situation second half 2025.
	SSD	6-8	Prices are increasing and are expected to increase all through CY2025.
Semtech	ISM SX12** Family	10-16	Stable lead time.
	ISM SX13** Family	10-16	Stable lead time.
	Power Discrete	10-20	Stable lead time.
	TVS	12-16	Stable lead time.
	Genum	22-28	Stable lead time.
STMicroelectronics	Auto MCU (SPC56 / SPC57 / SPC58)	26-32	Leadtime extending on specific product families, please provide us long term visibility.

/PRICE & LEAD TIME OVERVIEW - PRODUCT LIFE NEWS

SUPPLIER	PRODUCT	STATUS	COMMENTARY
NXP	Selected integrated circuits and discrete products.	End of life	EOL # 202411027DN - Last Time Buy December 30th 2025, subject to material availability. Load your orders as soon as possible to secure availability.
NXP	Selected mature automotive microprocessors.	End of life	EOL # 202412016DNU01 - Last time buy June 16th 2025, subject to material availability. Load your orders as soon as possible to secure availability.
NXP	HC908QY & HC908KX8 Product families.	End of life	EOL # 202412022DN - Last Time Buy June 19th 2025, subject to material availability.
NXP	Selected legacy automotive microcontrollers.	End of life	EOL # 202412008DN - Last time buy June 11th 2025, subject to material availability.
Renesas	Mature MCUs.	End Of Life	EOL SAF-B-24-0011 - Last Time Buy is June 30th 2025, subject to material availability. Load your orders as soon as possible to secure availability.
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. Load your orders as soon as possible to secure supply.
Diodes Inc	Rectifiers	New!	High voltage automotive power rectifiers : S*CMHQ 1000V.
Diodes Inc	Rectifiers	New!	DSC**A065LP - Silicon Carbide - SiC - rectifiers for high efficiency power solutions.