Q1 2026

Lead Time Report

SOURCEABILITY

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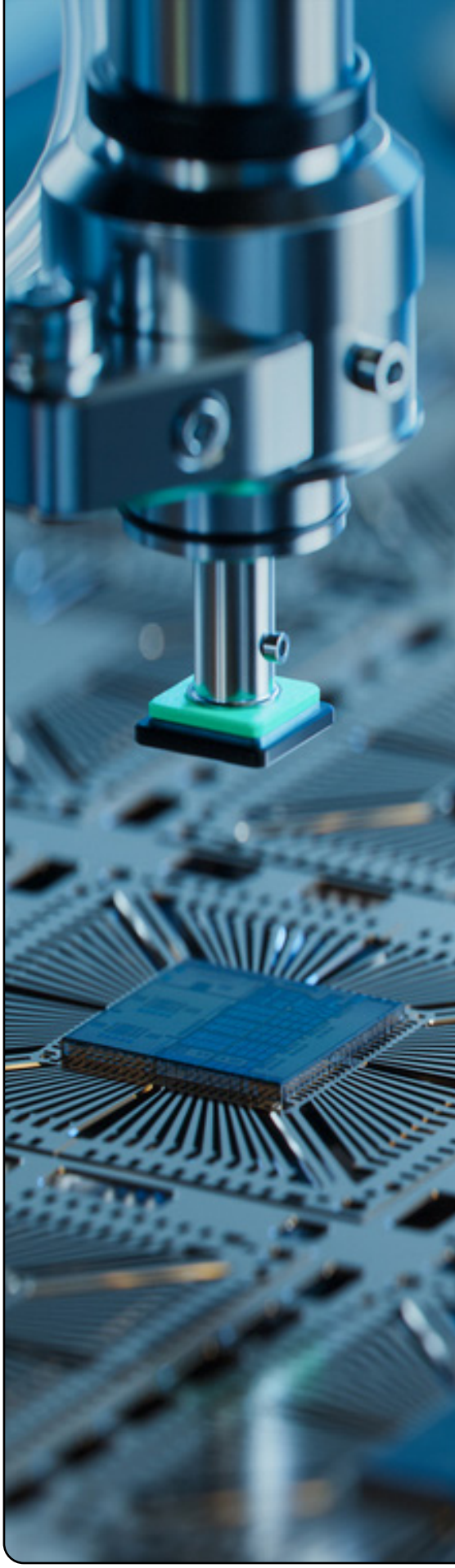
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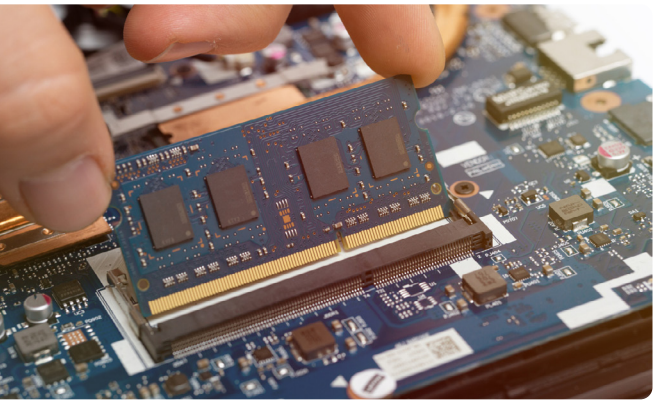
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AI is driving 50% of chip sales in 2026



No more hesitation, the entire market is finally free from glut

As we enter the next quarter, the electronic components industry is facing a very decisive fork in the road. One path leads to stable growth, while the other faces weeks of elongating lead times and dramatic price fluctuations. Memory, for the most part, remains one of the most constrained market segments of the electronic components industry.

Artificial intelligence demand, alongside rapid data center buildouts and growing infrastructure to support these initiatives, is draining most of the supply.

Memory prices have soared 80%-90% QoQ since Q4 2025

Since Q4 2025, the leading memory suppliers, Samsung, SK Hynix, and Micron, have shifted primarily to allocation-only contract models. These agreements mostly favor large, Tier 1 hyperscale companies or AI businesses that require large amounts of memory. These suppliers have also begun cracking down on hoarding, leading to stricter enforcement of order sizes.

Additionally, memory isn't the only market segment feeling the strain of AI demand. As data centers continue their build-outs, the infrastructure needed to support them, such as power, has seen sales rapidly increase. Raw material costs have been rising steadily, complicated by tariffs and other geopolitical tensions. As such, price trends through the active and passive markets are on the rise.

Furthermore, the Nexperia conflict remains unresolved, thereby constraining the discrete market. A court ruling came on February 14th, 2026, which called for an investigation into alleged mismanagement. The investigation will take up to six months, according to legal analysts.

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Power components are starting to feel the strain

While that takes place, Nexperia remains divided between its Chinese and Netherlands entities. Nexperia Netherlands has not resumed wafer shipments to China, meaning Nexperia China will need a stable domestic supply of wafers. Meanwhile, Nexperia Netherlands remains committed to expanding its Malaysian operations.

For IP&E segments, AI server builds are extending passive lead times, particularly in polymer tantalums and high-capacitance MLCCs. Interconnect suppliers are signaling metal-driven pricing adjustments, with logistics costs and tariff exposure remaining secondary accelerants.



Outside of AI, demand signals are not uniformly expansionary. IDC's projection of a 13% decline in smartphone shipments in 2026 reflects a notable slowdown in consumer interest. This is because OEMs and EMS providers are passing inflated component costs on to end users. With growing uncertainty and instability amid rising geopolitical tensions, consumers are holding off on replacing their devices.

Planning for Q2 2026 requires less focus on macro direction and more emphasis on supplier exposure and forecast credibility.

Senior analyst Jeongku Choi at Counterpoint Research shared that "the first quarter of 2026 is set to be the period where DRAM margins exceed their historical peaks for the first time. Having said that, this will either set a new normal or a very high bar which looks solid now but could make the next down cycle (if there is one) look uglier."

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VOLATILE MEMORY REMAINS THE TIGHTEST MARKET SEGMENT.

MOST SUPPLIERS ARE ALLOCATION ONLY.

SEMICONDUCTOR MARKET TRENDS

Volatile Memory

Future Lead Times Increasing ↑

Price Increasing ↑

Volatile memory continues to be the most constrained market segment. AI-driven demand has consumed most available supply with the leading suppliers, SK Hynix, Samsung, and Micron, favoring allocation only models for the most in-demand parts. Lead time and price will stay elevated through 2026, as contracts run through 2028.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
SRAM, pSRAM	Infineon	12 - 52 weeks *Allocation*	↑	↑
	Renesas	12 - 14 weeks	↔	↔
	ISSI	22 weeks *Tight demand*	↑	↑
DRAM, RLDRAM	ISSI	30 - 42 weeks	↑	↑
	Kingston	30 - 42 weeks *Allocation + prices up*	↑	↑
	Micron	52 weeks *Allocation*	↑	↑
	Samsung	30 - 42 weeks *Prices up*	↑	↑
DDRII, DDR3, DDR5	Micron	52 weeks *Allocation*	↑	↑
	Samsung	20 - 28 weeks *DDR5 allocation only*	↑	↑
	ISSI	20 weeks	↑	↑
	Kingston	24 - 42 weeks *Allocation*	↑	↑
DDR4, LPDDR4	Micron	52 weeks *Allocation*	↑	↑
	Samsung	26 - 34 weeks *Prices up*	↑	↑
	ISSI	20 - 32 weeks	↑	↑

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SEMICONDUCTOR MARKET TRENDS

Non-Volatile Memory

Future Lead Times Increasing ↑

Price Increasing ↑

Non-volatile memory continues to see specific areas of high constraint, specifically for flash memory. Pricing is more stable compared to volatile memory, as market tightness is hyper-focused in components more commonly used for AI.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
Flash-NOR	ISSI	14 weeks	↑	↑
	Infineon	12 - 26 weeks *Allocation*	↑	↑
	Macronix	32 weeks	↑	↑
	Micron	12 weeks	↑	↑
Flash-NAND	Delkin	12 - 14 weeks	↑	↑
	Macronix	32 weeks	↑	↑
	Microchip	14 weeks	↔	↔
	Micron	14 weeks	↑	↔
	Western Digital	6 - 8 weeks	↑	↔
FRAM, NVRAM	Infineon	12 - 16 weeks	↑	↔
	STMicroelectronics	14 - 20 weeks	↔	↔
EEPROM	Microchip	4 - 25 weeks	↔	↑
	Onsemi	12 - 20 weeks	↔	↔
	Renesas	12 - 16 weeks	↔	↔
	STMicroelectronics	9 - 14 weeks	↑	↑

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SEMICONDUCTOR MARKET TRENDS

Storage

Future Lead Times Increasing ↑

Price Increasing ↑

Allocation-only selling continues amongst the bigger suppliers, like Micron and Samsung, with major hyperscaler and tech companies absorbing most of the supply.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
eMMC	ISSI	20 weeks	↑	↑
	Kingston	24 - 26 weeks *Allocation*	↑	↑
	Macronix	30 - 52 weeks *Allocation*	↑	↑
	Western Digital	22 - 24 weeks *AI demand*	↑	↑
SSD	Kingston	2 - 4 weeks *Allocation*	↑	↑
	Micron	26 - 52 weeks *Allocation*	↑	↑
	Samsung	26 - 52 weeks *Allocation*	↑	↑
	Western Digital	14 - 16 weeks *AI demand*	↑	↑
Cards	Western Digital	14 - 16 weeks	↑	↑

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SEMICONDUCTOR MARKET TRENDS

Discrete

Future Lead Times Increasing ↑

Price Stable ↔

Lead times are extending, particularly across MOSFETs, bipolar components, and other protection devices. These trends are most visible amongst Nexperia parts, likely due to the crisis impacting shipments. The depleted market share is also causing constraints for other suppliers.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
Diodes	Diodes Inc.	15 weeks	↑	↑
	Nexperia	52 weeks	↑	↑
	Onsemi	24 - 52 weeks	↑	↔
	MCC	12 - 20 weeks	↑	↔
	Toshiba	10 - 14 weeks	↔	↔
	Vishay	12 - 40 weeks	↑	↔
Bi-polar	Diodes Inc.	40 weeks	↑	↑
	Infineon	20 - 24 weeks	↑	↑
	MCC	12 - 20 weeks	↑	↔
	Onsemi	24 - 52 weeks	↑	↑
	STMicroelectronics	22 - 30 weeks	↑	↔

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DISCRETE TRENDS

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
Small Signal	Diodes Inc.	14 weeks	↑	↑
	Nexperia	52 weeks	↑	↑
	Onsemi	24 - 52 weeks	↑	↔
	STMicroelectronics	14 - 18 weeks	↑	↔
	MCC	12 - 20 weeks	↑	↔
	Vishay	8 - 16 weeks	↑	↑
MOSFETs	Diodes Inc.	18 weeks	↑	↑
	Infineon	20 - 52 weeks	↑	↑
	Nexperia	52 weeks	↑	↑
	Onsemi	10 - 52 weeks	↑	↔
	STMicroelectronics	16 - 18 weeks	↑	↔
	MCC	16 - 36 weeks	↑	↔
	Toshiba	10 - 14 weeks	↔	↔
	Vishay	8 - 52 weeks	↑	↑
TVS, Protection	Diodes Inc.	17 weeks	↑	↑
	Nexperia	52 weeks *Export issue*	↑	↑
	Onsemi	14 - 18 weeks	↔	↔
	STMicroelectronics	14 - 18 weeks	↑	↔
	MCC	12 - 14 weeks	↔	↔
	Toshiba	10 - 14 weeks	↔	↔
	Vishay	8 - 12 weeks	↔	↔

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DISCRETE TRENDS

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
Coupler	Broadcom	13 - 26 weeks	↔	↔
	Onsemi	10 - 17 weeks	↑	↔
	Vishay	6 - 10 weeks	↔	↔
Power WBG	Infineon	20- 28 weeks	↔	↑
	Onsemi	14 - 16 weeks	↑	↔
RF	Microchip	30 - 52 weeks	↑	↔
	Infineon	12 - 40 weeks	↑	↔
Thyristors, Triacs, IGBT	Onsemi	8 - 31 weeks	↑	↑
	STMicroelectronics	16 - 20 weeks	↑	↔
Rectifiers	Diodes Inc.	15 weeks	↑	↑
	STMicroelectronics	14 - 16 weeks	↑	↔
	Toshiba	10 - 14 weeks	↔	↔
	Onsemi	20 - 24 weeks	↑	↑
	Vishay	8 - 20 weeks	↔	↔

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SEMICONDUCTOR MARKET TRENDS

Logic

Future Lead Times Stable ↔

Price Stable ↔

Logic remains broadly stable, but standard logic is showing strain from increasing lead time pressure. This is due to the ongoing Nexperia disruption, despite shipments resuming after China lifted its export controls.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
Programmable	AMD	18 - 24 weeks	↔	↔
	Infineon	20 - 24 weeks	↔	↔
	Microchip	12 - 20 weeks	↔	↔
Standard	Nexperia	8 - 10 weeks	↑	↔
	Onsemi	8 - 15 weeks	↑	↔
Logic IC	Toshiba	20 - 24 weeks	↔	↔

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SEMICONDUCTOR MARKET TRENDS

Advanced Analog

Future Lead Times Stable ↔

Price Stable ↔

The market is beginning to experience early signs of selective tightness, with Renesas and Onsemi seeing lead time trends extending. There is a spread of growing multi-week lead times across suppliers, which may indicate growing risks in mid-2026.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
Dataconverters	Microchip	6 - 8 weeks	↔	↔
	Renesas	18 weeks	↑	↔
	STMicroelectronics	12 - 30 weeks	↔	↔
OPA	Microchip	6 - 8 weeks	↔	↔
	MPS	16 - 24 weeks	↑	↔
	NXP *Price increase*	16 weeks	↔	↑
	Onsemi	6 - 16 weeks	↑	↔
	STMicroelectronics	10 - 20 weeks	↔	↔
Interfaces: LVDS, UART USB	Microchip	6 - 8 weeks	↔	↔
	MPS	16 - 24 weeks	↑	↔
	NXP *Price increase*	10 - 20 weeks	↔	↑
	Renesas	12 weeks	↑	↔
	STMicroelectronics	12 - 30 weeks	↔	↔
Power Management: Low Drop, PWM, Switching Regulators	Infineon	14 - 18 weeks	↔	↔
	Microchip	6 - 8 weeks	↔	↔
	MPS	16 - 22 weeks	↑	↔
	Onsemi	12 - 20 weeks	↑	↔
	STMicroelectronics	12 - 18 weeks	↔	↔
Analog	Toshiba	12 - 16 weeks	↔	↔

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SEMICONDUCTOR MARKET TRENDS

Embedded Processing

8-Bit | 16-Bit | 32-Bit | MCU

Future Lead Times Stable ↔

8-Bit | 16-Bit | 32-Bit | MCU

Price Stable ↔

Lead times and pricing are holding steady with some tightness in popular packages based on precautionary expedited orders and tariff concerns.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
8-bit	Infineon	18 - 22 weeks	↔	↔
	Microchip	6 - 8 weeks	↔	↔
	NXP	16 - 22 weeks	↑	↔
	STMicroelectronics *Capacity tightening*	15 - 26 weeks	↑	↔
16-bit	Infineon	18 - 24 weeks	↔	↔
	Microchip	12 - 20 weeks	↔	↔
	NXP	16 - 22 weeks	↑	↔
	STMicroelectronics	15 - 26 weeks	↔	↔
32-bit	Infineon	18 - 24 weeks	↔	↔
	Microchip	8 - 10 weeks	↔	↔
	NXP	16 - 26 weeks	↔	↔
	STMicroelectronics *Capacity tightening*	15 - 26 weeks	↑	↔
MCU	Renesas	14 - 18 weeks	↔	↔

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SEMICONDUCTOR MARKET TRENDS

Optoelectronics

Future Lead Times Stable ↔

Price Stable ↔

Optoelectronics are seeing greater stability in comparison to the rest of the discrete market.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
High Power: IR, Visible, Laser, LED	amsOSRAM	10 - 24 weeks	↔	↔
	Broadcom	13 - 24 weeks	↔	↔
Low Power: IR, Visible, Laser, LED	amsOSRAM	10 - 24 weeks	↔	↔
	Broadcom	13 - 25 weeks	↔	↔

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SEMICONDUCTOR MARKET TRENDS

Sensors

Future Lead Times Stable ↔

Price Stable ↔

Lead times remain broadly stable, yet pockets of stress are emerging exactly where AI and industrial automation overlap. Consumer demand is beginning to increase, which could contribute to lead times extending.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
Pressure	Amphenol	8 - 26 weeks	↔	↔
	Infineon	20 - 22 weeks	↔	↔
	STMicroelectronics	20 - 22 weeks	↔	↔
	TE Connectivity	10 - 30 weeks	↔	↔
Time of Flight	amsOSRAM	4 - 16 weeks	↔	↔
	Broadcom	12 weeks	↔	↔
	STMicroelectronics	16 - 22 weeks	↓	↔
	TE Connectivity	12 - 30 weeks	↔	↔
Position	amsOSRAM	5 - 20 weeks	↔	↔
	Broadcom	18 - 26 weeks	↔	↔
	TE Connectivity	20 - 40 weeks	↔	↔
	Vishay	6 - 10 weeks *Proximity sensors by Vishay*	↔	↔

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SENSOR TRENDS

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
Image	amsOSRAM	26 - 30 weeks	↔	↔
T & H	Amphenol	1 - 6 weeks	↓	↔
	amsOSRAM	8 - 23 weeks	↔	↔
	STMicroelectronics	16 - 20 weeks	↔	↔
	TE Connectivity	8 - 20 weeks	↔	↔
Sensors	NXP	16 - 52 weeks	↔	↔
	Onsemi	18 - 52 weeks	↔	↑
	Vishay	6 - 10 weeks *Vishay light sensors*	↔	↔
Accelerometers	STMicroelectronics	16 - 18 weeks *Price increase*	↑	↑
	TE Connectivity	15 - 30 weeks	↔	↔
	TDK	15 - 30 weeks	↑	↔
ALS	amsOSRAM	2 - 16 weeks	↔	↔
	Broadcom	26 - 36 weeks	↔	↔
Slotted Interrupters, MEMS	Vishay	6 -10 weeks	↔	↔

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PEMCO MARKET TRENDS

Passives

Future Lead Times Increasing ↑

Price Increasing ↑

Customer and AI-driven demand is increasing, contributing to lead time and cost growth. MLCC product families are bearing the brunt of this change, with high CV products seeing the most demand.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
Resistors Thick and Thin Film	Bourns	12 - 16 weeks	↔	↔
	Kemet / Yageo	16 - 22 weeks	↔	↔
	Panasonic	12 - 16 weeks	↔	↔
	Vishay	10 - 16 weeks *Thin Film 8 - 12 weeks*	↔	↔
Resistors Networks and Arrays	Bourns	8 - 15 weeks	↔	↔
	Panasonic	12 - 16 weeks	↔	↔
	Vishay	10 - 14 weeks	↔	↔
Resistors Trimmers and Wirewound	Panasonic	14 - 20 weeks	↔	↔
	Vishay	12 - 20 weeks	↑	↑
Capacitors Aluminium	Kemet / Yageo	22 - 34 weeks	↑	↑
	Panasonic	26 - 40 weeks *POSCAP price increase Feb 1, 2026*	↑	↑
	TDK	22 - 36 weeks	↔	↔
Inductors	Bourns	12 - 20 weeks	↔	↔
	Kemet / Yageo	16 - 26 weeks	↔	↔
	Kyocera AVX	16 - 20 weeks	↔	↔
	Murata	10 - 14 weeks	↔	↔
	Samsung	12 - 26 weeks	↔	↔
	Taiyo Yuden	8 - 14 weeks	↔	↔
	TDK	20 - 25 weeks	↔	↔
	Vishay	10 - 20 weeks	↔	↔

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PASSIVES PEMCO TRENDS

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
Film Caps	Kemet / Yageo	20 - 28 weeks	↔	↔
	Kyocera AVX	20 - 32 weeks	↔	↔
	TDK	19 - 30 weeks	↔	↔
Capacitors Ceramic Multilayer (MLCC) *MLCC high CV lead times extending on multiple suppliers*	Kemet / Yageo	16 - 20 weeks	↑	↔
	Kyocera AVX	12 - 28 weeks	↑	↑
	Murata	10 - 16 weeks	↑	↔
	Samsung	16 - 26 weeks	↑	↔
	Taiyo Yuden	12 - 20 weeks	↑	↔
	TDK	16 - 28 weeks	↔	↔
	Vishay *Price increase*	12 - 32 weeks	↑	↑
Capacitors Tantalum Standard and Low ESR	Kemet / Yageo	16 - 20 weeks	↔	↔
	Kyocera AVX	12 - 16 weeks	↑	↑
	Vishay *Price increase*	12 - 18 weeks	↑	↑
Capacitors Tantalum Polymer	Kemet / Yageo	22 - 30 weeks	↑	↑
	Kyocera AVX	18 - 28 weeks	↑	↑
	Vishay *Price increase*	18 - 50 weeks	↑	↑
Military Ceramics: M123, M49470, leaded	Kemet / Yageo	16 - 20 weeks	↔	↔
	Kyocera AVX	12 - 36 weeks	↔	↔
	Vishay	27 - 36 weeks	↔	↔
Military Tantalums: M39003, M9006, CWR	Kemet / Yageo	16 - 20 weeks	↔	↔
	Kyocera AVX	16 - 28 weeks	↔	↔
	Vishay	26 - 44 weeks	↑	↑
Military Resistors: M55342	Vishay	8 - 20 weeks	↑	↑

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PEMCO MARKET TRENDS

Interconnect

Future Lead Times Stable ↔

Price Increasing ↑

Lead times remain stable, but pricing trends are high and will continue to grow in the coming weeks. This is mainly due to increasing costs for raw materials, specifically metals, as well as inflation. As a result, suppliers will be attempting to recover costs through 1H26 with broad price hikes on a number of product families.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
Backplane	Amphenol	7 - 14 weeks	↔	↑
	ITT *Price increase*	16 - 28 weeks	↔	↑
	Molex	15 - 19 weeks	↔	↑
	TE Connectivity *Price increase*	10 - 16 weeks	↔	↑
Circular	Amphenol	12 - 20 weeks	↔	↑
	Conesys	10 - 20 weeks	↔	↑
	Glenair	3 - 6 weeks	↔	↑
	ITT *Price increase*	16 - 22 weeks	↔	↑
	ODU	8 - 14 weeks	↔	↑
	TE Connectivity *Price increase*	12 - 16 weeks	↔	↑
D-Shaped	Amphenol	8 - 14 weeks	↔	↑
	Glenair	3 - 6 weeks	↔	↑
	ITT *Price increase*	16 - 28 weeks	↔	↑
	TE Connectivity *Price increase*	10 - 18 weeks	↔	↔
I/O	Amphenol	8 - 10 weeks	↔	↑
	Molex	12 - 18 weeks	↔	↑
	TE Connectivity *Price increase*	12 - 16 weeks	↔	↑

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INTERCONNECT PEMCO TRENDS

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
Power	Amphenol	8 - 12 weeks	↔	↑
	Molex	12 - 19 weeks	↔	↑
	Samtec	1 - 6 weeks	↔	↔
	TE Connectivity *Price increase*	12 - 16 weeks	↔	↑
Terminal Block	Amphenol	6 - 12 weeks	↔	↑
	Molex	10 - 16 weeks	↔	↑
	TE Connectivity *Price increase*	12 - 16 weeks	↔	↑
Discrete Housing	Amphenol	6 - 14 weeks	↔	↑
	Molex	10 - 16 weeks	↔	↑
	Samtec	4 - 8 weeks	↔	↔
	TE Connectivity *Price increase*	12 - 18 weeks	↔	↑
PC Board	Amphenol	6 - 16 weeks	↔	↑
	ITT *Price increase*	14 - 18 weeks	↔	↑
	Molex	12 - 18 weeks	↔	↑
	Samtec	1 - 6 weeks	↔	↔
	TE Connectivity *Price increase*	12 - 20 weeks	↔	↑
Cable Assemblies	Amphenol	10 - 14 weeks	↔	↑
	Glenair	3 - 6 weeks	↔	↑
	ITT	16 - 28 weeks	↔	↑
	Molex	15 - 20 weeks	↔	↑
	Samtec	3 - 10 weeks	↔	↔
	TE Connectivity	15 - 21 weeks	↔	↑

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INTERCONNECT PEMCO TRENDS

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
Connector Accessories	Amphenol	12 - 16 weeks	↔	↑
	Glenair	3 - 6 weeks	↔	↑
	ITT *Price increase*	14 - 18 weeks	↔	↑
	Molex	10 - 16 weeks	↔	↑
	ODU	8 - 12 weeks	↔	↑
	TE Connectivity *Price increase*	12 - 19 weeks	↔	↑
Connector Contacts	Amphenol	12 - 18 weeks	↔	↑
	Carlisle	10 - 20 weeks	↔	↑
	ITT *Price increase*	14 - 18 weeks	↔	↑
	Molex	10 - 16 weeks	↔	↑
	TE Connectivity *Price increase*	12 - 20 weeks	↔	↑

Information subject to change without notice. This report is gathered from multiple sources to provide a high-level overview of the market conditions as our global product team sees them. Please contact Sourceability if you have any questions.

PEMCO MARKET TRENDS

Electro-Mechanical

Future Lead Times Increasing

Price Increasing

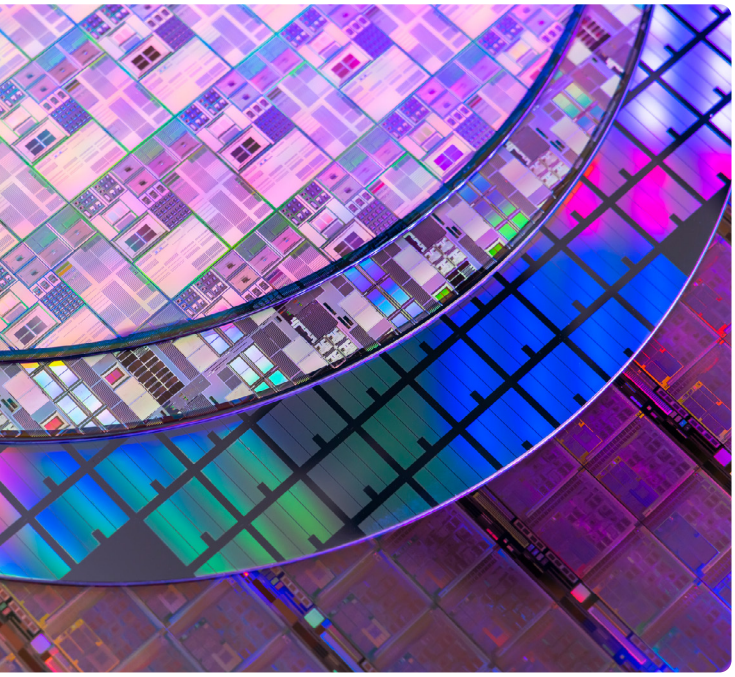
Electromechanical trends will see prices and lead times increase in the next quarter, with power components facing the brunt of the change. Artificial intelligence demand is the primary driver behind this change, alongside growing raw materials and logistics costs.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
Thermal	ebm-papst	25 weeks	↔	↑
Frequency Control: Oscillators, MEMS, KHZ, and Watch Crystal	Abracon	12 weeks *MEMS at 26 weeks*	↔	↑
	ECS	12 weeks *MEMS at 26 weekss*	↔	↑
Switch Relays	OMRON	14 weeks	↔	↑
Power: AC/DC, DC/DC	ABB	24 weeks	↑	↑
	Artesyn	24 weeks	↑	↑
	Bel	24 weeks	↑	↑
	MEAN WELL	17 weeks	↑	↑
	Murata	10 - 38 weeks	↑	↑
	TDK	24 weeks	↑	↑
	Lambda	24 weeks	↑	↑

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Final Thoughts

AI is the driving force behind chip sales



Price fluctuations will be more common through 1H26

While most semiconductor and IP&E categories remain operationally stable, structural pressure in memory and specific discrete lines continues to complicate Q2 planning. Geopolitical developments on top of AI demand are amplifying risk in targeted segments, but not across the entire market.

Memory mitigation will be the most immediate priority for many industries. Wafer migration toward HBM and advanced DRAM nodes has significantly congested general-purpose DRAM supplies. Allocation-only contracts signal that this will continue for some time. Organizations with long-lifecycle designs should continue to monitor product lifecycles while qualifying alternative suppliers to diversify their base.

Likewise, discrete exposure requires similar attention. The Nexperia crisis has demonstrated how quickly single-supplier dependencies can ripple across the broader ecosystem, tightening lead times even where aggregate capacity exists. Supplier diversification and proactive buffer strategies are prudent safeguards, especially for categories where market consolidation has left limited sources.

IP&E markets are moving more gradually, but warrant continued oversight. Select product families tied to AI infrastructure are extending, and raw material cost inflation may introduce incremental pricing adjustments in the coming quarters.

Companies should continue to manage memory exposure and diversify critical suppliers proactively.

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