

## MARKET DATA AND PRICE LEAD TIMES - Q1 / 2025

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266.98	+ 7.43
1,579.06	- 4.02
10.05	+ 0.23
6,172.49	- 278.90
28,437.70	- 35.56
12,169.24	+ 175.08
37,985.44	- 77.14

# / EXECUTIVE SUMMARY

The global semiconductor industry enters 2025 on stable footing after a steady 2024, where markets remained largely flat. Stability was primarily supported by demand from Asia and the US, while EMEA faced ongoing challenges. Looking forward, the industry is cautiously positioned for a rebound, with recovery expected to gain traction through 2027. Asia's stronger-than-expected performance offers a measure of resilience in an otherwise subdued global environment.

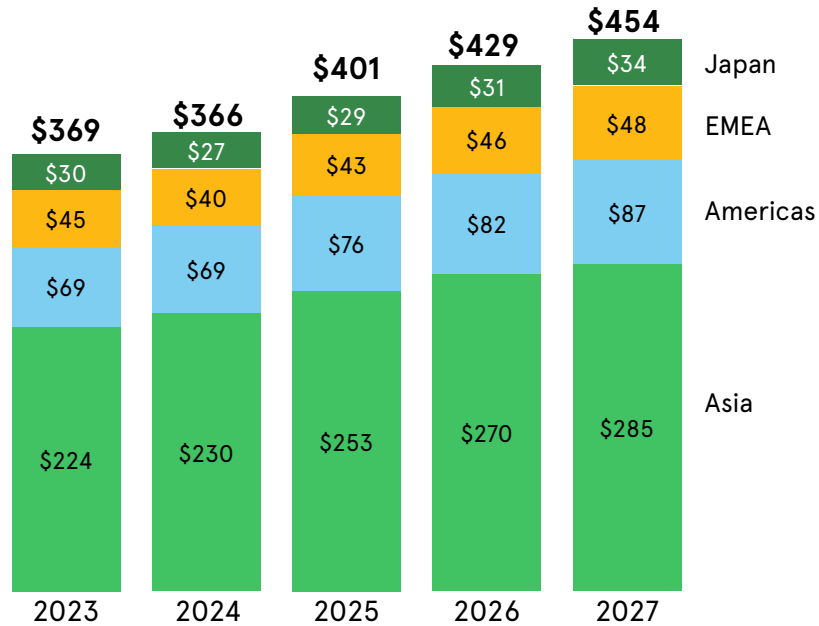
Supply chains continue to stabilize, with inventory levels improving and end-user demand showing early signs of recovery. The IP&E sector has been a consistent performer, reporting steady quarterly revenue growth over the past six months. However, soft growth trends in some areas highlight the need for vigilance to avoid mismatches between production capacities and demand, which could lead to supply bottlenecks and extended lead times.

Artificial intelligence remains a key driver of change in the semiconductor landscape. Over the next three years, AI chip usage is expected to expand, driven by hardware-intensive sectors such as Wireless Communication and Data Processing. At the same time, "AI at the Edge" continues to open new opportunities, spurring innovation in Industrial, Automotive, and Consumer markets. Beyond AI, increased security requirements, geopolitical factors, and rising investments in Aerospace and Defense are shaping the evolving market landscape.

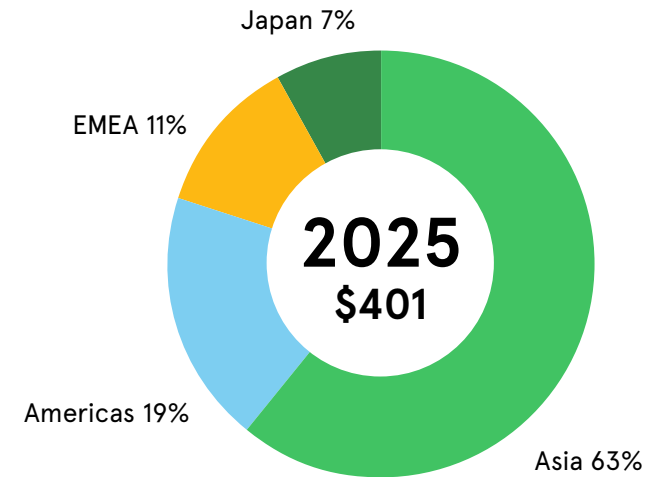
This edition provides critical updates on pricing, lead times, and trends, equipping you with the insights needed to navigate the semiconductor industry in 2025 and beyond.

# GLOBAL SEMI OUTLOOK BY REGION

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



Region	2023	2024	2025	2026	2027	3-YR CAGR	3-YR Growth
EMEA	3.2%	-11.0%	6.3%	6.9%	5.3%	6.2%	\$7.9
Japan	-4.9%	-10.3%	9.1%	7.7%	6.6%	7.8%	\$6.8
Asia	-9.3%	2.6%	9.9%	6.8%	5.5%	7.4%	\$54.8
Americas	4.2%	-0.8%	10.3%	7.7%	6.0%	8.0%	\$17.8
<b>Grand Total</b>	<b>-5.3%</b>	<b>-0.8%</b>	<b>9.5%</b>	<b>7.0%</b>	<b>5.7%</b>	<b>7.4%</b>	<b>\$87.3</b>



Region	2025
Asia	\$253
Americas	\$76
EMEA	\$43
Japan	\$29

Source: Avnet estimate based on industry data – Dec 2024 | Data based on end customer

# / 2026 GLOBAL OUTLOOK

- Market continues momentum as served-semi  $\uparrow$  7.0% Y/Y to \$429B
- AI and high-performance computing expecting to maintain growth as gen-AI, machine learning, and advanced analytics mature
- 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
- CapEx spending  $\uparrow$  6.9% to \$194B
- WW GDP latest forecast  $\uparrow$  2.7%; down from 2.9% in 2025
  - Largely driven by Americas ( $\uparrow$  29%) and South Korea ( $\uparrow$  22%) accounting for \$16B in investment



Source: Avnet estimate based on industry data – Dec 2024 | Data based on end customer

# / ECONOMIC SUMMARY FOR EUROPE

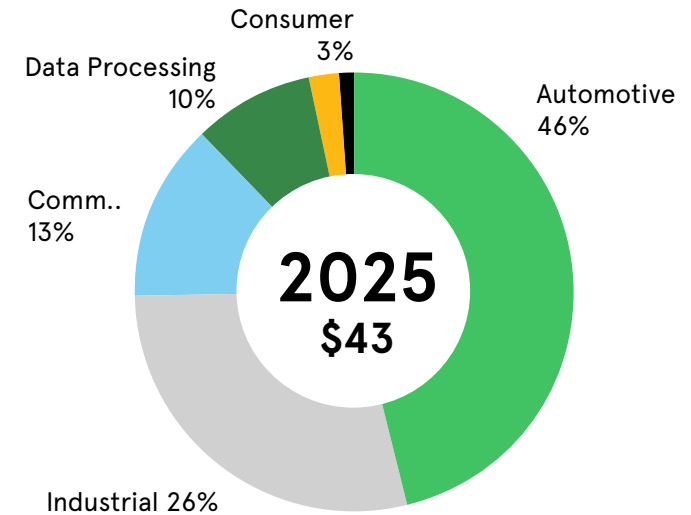
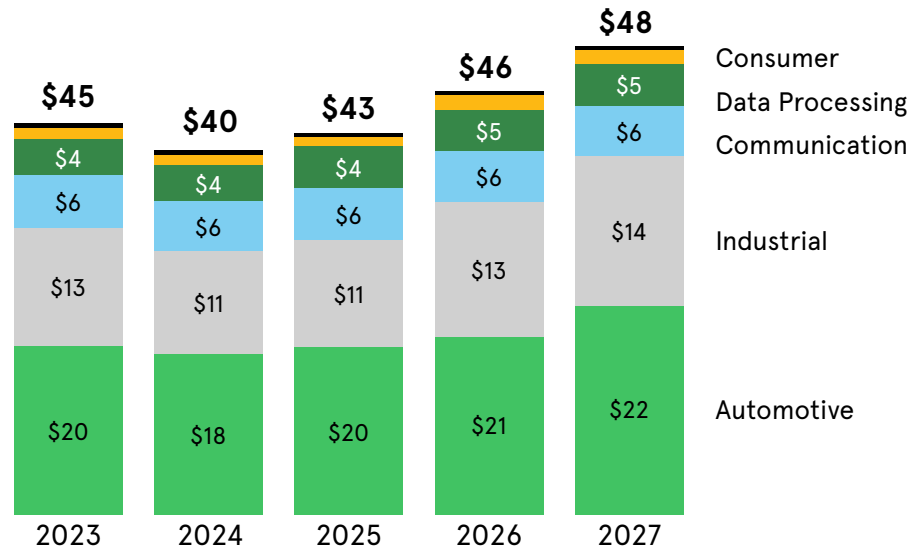
The December report showing the **EU PMI** declining to 45.1 from 45.2 the previous month. The mark continues the 30-month decline seen in EU manufacturing. All indicators – Output, new order, purchasing activity, inventory and employment were down at an accelerated pace. Costs remain steady while prices dropped, which will add to financial challenges. Only business confidence was modestly up, though based on what is unclear.

Until businesses start purchasing for production this is not going to turnaround. As in the previous months, the issues remain centered in the major economies – Germany, France, & Italy – with France dropping to its lowest point since May 2020. Greece and Spain remain positive, but Spain which has a lower exposure to the China and cheaper power will not be able to turnaround the EU with its 12% of the EU manufacturing output. In the just released World Economic Outlook (WEO) report, the EU economic projections were cut from 1,2% to 1,0% based on the weak manufacturing sector, declining exports and general market conditions linked with turmoil in various EU governments. 2026 is projected to rise to 1,4% as domestic demand increases, financial conditions loosen, and uncertainty declines.

Source: Avnet estimate based on industry data – Dec 2024

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

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




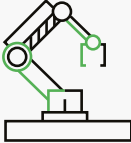
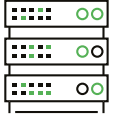

Vertical	2023	2024	2025	2026	2027	3-YR CAGR	3-YR Growth
Automotive	18.7%	-6.2%	9.0%	6.6%	4.8%	6.8%	\$4.0
Industrial	0.3%	-20.2%	7.1%	11.5%	10.8%	9.8%	\$3.4
Data Processing	-8.7%	-3.0%	4.3%	6.5%	3.0%	4.6%	\$0.6
Mil/Aero	-3.3%	-16.5%	-1.1%	5.7%	5.5%	3.3%	\$0.1
Communication	-12.0%	-10.5%	1.2%	1.2%	-0.8%	0.5%	\$0.1
Consumer	-20.4%	-14.8%	-6.5%	-2.2%	-3.8%	-4.2%	(\$0.2)
<b>Grand Total</b>	<b>3.2%</b>	<b>-11.0%</b>	<b>6.3%</b>	<b>6.9%</b>	<b>5.3%</b>	<b>6.2%</b>	<b>\$7.9</b>

Vertical	2025
Automotive	\$20
Industrial	\$11
Communication	\$6
Data Processing	\$4
Consumer	\$1

Source: Avnet estimate based on industry data – Dec 2024 | Data based on end customer



# TOP APPLICATION GROWTH EMEA

Application	Vertical	2024	2027	Δ	3-YR CAGR
Electrified Powertrain	 Automotive	\$4.0	\$5.9	\$1.9	13.7%
ADAS		\$3.9	\$5.3	\$1.3	10.3%
Automotive HPC		\$0.9	\$2.1	\$1.2	31.5%
Transportation	 Industrial	\$2.2	\$3.4	\$1.2	15.4%
Agriculture		\$0.6	\$1.0	\$0.5	21.3%
Automation		\$1.2	\$1.6	\$0.4	10.1%
Medical/Healthcare		\$1.4	\$1.6	\$0.2	4.9%
Energy Management		\$1.3	\$1.3	\$0.1	2.1%
PCs	 Data Processing	\$1.8	\$2.7	\$0.9	14.2%
Fixed Access SEA	 Communication	\$0.6	\$0.8	\$0.2	9.5%

Source: Avnet estimate based on industry data – Dec 2024 | 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)	8	=	8	=	10	=	12-14	=	12	=
SOD323 (F)	8	=	6	=	10	=	12-14	=	12	=
SOD523	8	=	8	=	10	=	12-14	=	12	=
SOT23	8 - 16	-	6	=	10	=	12-14	=	12	=
SOT323 (SC70)	8	=	6	=	12	=	12-14	=	12	=
SOT363 (SC88)	8	=	6	=	10	=			12	=
SOT89	8	-	6	=	14	=			12	=
SOT223	8	=	6	=	12	=	12-16	=	12	=
SMA -SOD123W	8	=	6	=	11	=	12-16	=	12	=
SMB -SOD128W	8	=	6	=	12	=	12-16	=	12	=
SMC	8	=			12	=	12-16	=	12	=
LFPK (MOSFET/Rectifier)	8-10	=	13-16	=	12-14	=	14-20	=	24	-
SO8 (MOSFET)	8-10	=	13	=	26	=	16-20	=	30	=
TO220	8	=	13	=	18-20	=	16-20	=	14	=
TO247	8	=	13	=	18-20	=	16-20	=	14	=
DKPAK	8-10	=	13	=	24	=	16-20	=	14	=
D2PAK	8-10	=	13	=	26	=	16-26	=	16	=
DFNs (Small Signal)	8-10	=	6	=	12	=	12-14	=	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	8	=						
SO14	8	=	2-8	=	9-16	=	9-20	=
SO16	8	=	2-8	=	9-16	=	9-20	=
SO20	8	=	2-8	=	9-16	=	9-20	=
SO24	16	+	2-8	=	9-16	=	9-20	=
SO8	8	-			9-16	=	9-20	=
SOT23-5/SOT23-6	8-12	-					9-20	=
SOT363/353 (SC70/SC88)	8	-					9-20	=
TO220							9-20	=
TSSOP14	8	=	2-8	=	9-16	=	9-20	=
TSSOP16	8	=	2-8	=	9-16	=	9-20	=
TSSOP20	8	=	2-8	=	9-16	=	9-20	=
TSSOP24	8	=	2-8	=	9-16	=	9-20	=
TSSOP48			2-8	=	9-16	=		
TSSOP56			2-8	=	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	→	→	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	→	→	16+	

# PRICE & LEAD TIME OVERVIEW - MARKET OVERVIEW

MEMORY	PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)	COMMENTS	
Flash	NOR	→	→	9-16	
	NAND	→	→	16+	
eMMC	→	→	→	9-16	Leading edge forecast critical.
EEPROM	↓	→	→	2-8	
DRAM	→	→	→	16+	Leading edge product leadtime increasing expected, due to high demand of AI applications. Forecast critical. Legacy DRAM widely available.
SRAM	→	→	→	2-8	
Solid State Drives	→	→	→	16+	Leading edge forecast critical due to high demand in AI applications

PROGRAMMABLE LOGIC	PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)	COMMENTS	
	→	→	→	16+	Mid/long term visibility is key to maintain supply. Price increased occurred in december 2024 on selected product families (+10% or +20%).

STANDARD LOGIC	PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)	COMMENTS	
Timing Products	→	→	→	26+	
Interface	→	→	→	26+	
Connectivity	→	→	→	26+	
Standard Logic	→	→	→	16+	

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	→	→	→	9-16
MCU Total	→	→	→	16+	
Automotive MCU	→	→	→	26+	
DSP	→	→	→	26+	

# PRICE & LEAD TIME OVERVIEW - SUPPLIER SPECIFICS

SUPPLIER	PRODUCT	LEAD TIME (WEEKS)	COMMENTARY
Alliance Memory	SRAM, Flash	8	Stock to 8 weeks max on SRAM. Good support on all products.
	DRAM Modules	8-10	Some fluctuations in the market but stable pricing. Alliance Memory offer most parts for 10+ years. Commitment to legacy products.
Cirrus	MS Audio	12-26	Decreased lead time.
	UK Audio	12-26	Decreased lead time.
	UK Mems	12-26	Decreased lead time.
Coilcraft	Shielded Power Inductors	6-10	Stable lead time.
	RF inductor, ceramic core	6-10	Stable lead time.
Delkin Devices	(micro)SD card, eMMC, SSD	8-12	Stable lead times and pricing. Focus on NPI parts.
Diodes Inc	AL*** expanded LED driver portfolio	8	Expanded range of more complex LED driver product.
ISSI	Legacy DRAM	12-15	Stable lead time and pricing strategy, focus on Automotive and Industrial customers.
	eMMC	8-12	Low density (from 4GB) available with long term road maps.
Kingston	eMMC, DRAM	4-8	Very short lead times, Capacity on new designs. Low density eMMC (from 4GB) available. New LP4 products added to portfolio
Lumileds	Various	8-16	10% price increase as of January 27th on various packages : LUXEON IR Domed, Rebel (Color/ES/Plus), UV, TX, M, Z, CZ, MX, and Midpower (3014 & 3535L HE).
Macronix	NOR Flash	12-15	Strong support across all products.
Marvell	ICs	26	Stable lead time.
	Boards	20-52	Stable lead time.
Microchip	All	10-40	Stable lead time.

to be continued... ►►

# PRICE & LEAD TIME OVERVIEW - SUPPLIER SPECIFICS

SUPPLIER	PRODUCT	LEAD TIME (WEEKS)	COMMENTARY
<b>Micron</b>	DRAM Modules	20-24	LP4 & LP5 Modules competitive in pricing.
	eMMC	18-20	Stable lead times, but forecast helpful to ensure supply.
	Legacy DRAM (DDR3 and older), NOR, SLC Nand	6-8	Good availability, competitive pricing.
	Leading edge DRAM (DDR4/5, LP4/5)	20-24	Forecast critical. Production capacity based on forecast.
	SSD	18-20	Forecast critical. Production capacity based on forecast.
	LPPDR4-5 / DDR4-5	20-24	HBM Capacity constraint. Flat pricing.
<b>MPS</b>	All	12-28	Slightly increase lead time.
<b>Nexperia</b>	GaN FET	12	Decreased lead time considering stock on SOT8005.
	GaN FET	16	New RFS products on SOT8087.
<b>Nordic Semiconductor</b>	All	12-26	Stable lead time.
<b>Quectel</b>	All	10-16	Stable lead time.
<b>Renesas</b>	Embedded Processing	12-16	Stable lead time.
	High Performance Computing	24	Stable lead time.
	Analog and Connectivity	12-24	Stable lead time.
	Power	12-24	Stable lead time.
<b>Sandisk</b>	Memory cards, eMMC, SSD	6-8	Longevity and commitment for low capacities (8GB, 16GB).
<b>Semtech</b>	ISM SX12** Family	8-16	Stable lead time.
	ISM SX13** Family	8-16	Stable lead time.
	Power Discrete	8-20	Stable lead time.
	TVS	12-16	Decreased lead time.
	Genum	22-28	Stable lead time.

# / PRICE & LEAD TIME OVERVIEW - PRODUCT LIFE NEWS

SUPPLIER	PRODUCT	STATUS	COMMENTARY
NXP	Selected Mifare & Ucode products with some replacement parts.	End of Life	EOL # 202406023DN - Last Time Buy March 28th 2025, subject to material availability. Load your orders asap to secure availability.
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 asap 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 asap 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, <b>subject to material availability.</b> Load your orders asap 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 asap.
Renesas	Selected mature MCUs - M30833 & M30835 families.	End of Life	EOL SAF-B-24-0032 - Last Time Buy March 31st 2025, <b>subject to material availability.</b> Load your orders asap to secure availability.