MARKET REPORT Q2 2026

FROM JUST-IN-TIME TO JUST-IN-CASE: RISK VS. REDESIGN

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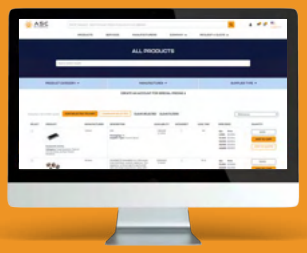

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ASC Global delivers cutting-edge industry insights and trends. The following sections provide valuable information gathered from research, expert insights from our team, and reliable sources in the industry.

Lead-Time Report

The following insights stem from thorough research of ASC Global's marketing team combined with the expertise of all our departments. The information is designed to provide guidance and should be approached as such.
ASC Global excels in supply chain strategies that effectively address market volatility. For a deeper understanding, kindly reach out to your Account Manager.

↔ Stable ↑ Increasing ↓ Decreasing EOL End-of-life

Analog | **Power** | **Logic & Digital** | **Passives** | **Electromechanical** | **Memory**

Analog

Factory Lines					Open Market	
Product	Brand	Lead time weeks	Prognosis	Pricing Trend	Availability	Pricing Trend
Gate Drivers	Power Integrations	8-12	↔	↔	↔	↔
	ROHM	16-20	↑	↔	↔	↔
	Silergy	14-16	↔	↔	↔	↔
	Allegro MicroSystems	20-22	↔	↑	↔	↔
LED Drivers	Diodes Incorporated	16-18	↔	↑	↔	↑
	MPS	24-36	↑	↔	↔	↔
	ROHM	16-26	↑	↔	↔	↔
	STMicroelectronics	18-24	↔	↔	↔	↔
Timing	Onsemi	22-32	↔	↔	↔	↔
	Microchip	7-12	↔	↔	↔	↔
	Renesas	20-26	↑	↑	↑	↑

Factory Lines					Open Market	
Product	Brand	Lead time weeks	Prognosis	Pricing Trend	Availability	Pricing Trend
Interface	NXP	16-20	↔	↑	↔	↑
	Renesas	20-26	↑	↑	↔	↑
Amplifiers and Data Converters	Microchip	4-10	↔	↔	↔	↔
	Onsemi	22-32	↔	↔	↔	↔
	Renesas	14-16	↑	↑	↔	↑
	STMicroelectronics	20-22	↑	↔	↔	↔
Power Converters/ Controllers	Infineon	16-24	↑	↑	↔	↑
	MPS	24-36	↑	↔	↔	↔
PMIC	Nordic Semiconductor	18-20	↔	↔	↔	↔
	NPX	22-24	↔	↑	↔	↑

Analog chipmakers like Analog Devices, Inc. reported strong Q1 results with AI data center power/communications and industrial analog demand, while Texas Instruments Incorporated maintains leadership with broad analog/converter portfolios and pricing actions. Industry pricing shifts affect digital isolators, power management ICs, and supply. Analyst coverage remains active.

Power

Factory Lines					Open Market	
Product	Brand	Lead time weeks	Prognosis	Pricing Trend	Availability	Pricing Trend
IGBT's	STMicroelectronics	14-20	↑	↔	↔	↔
	Littelfuse	15-60	↔	↑	↔	↑
	Microchip	12-26	↔	↔	↔	↔
	Infineon	10-44	↑	↔	↔	↔
High Voltage MOSFET's	Infineon	12-52	↑	↑	↔	↑
	Littelfuse	23-52	↔	↑	↔	↑
	Microchip	6-28	↑	↑	↔	↑
	STMicroelectronics	13-26	↑	↔	↔	↔
Low Voltage MOSFET's	Infineon	12-52	↑	↑	↔	↑
	ONSEMI	10-52	↑	↑	↔	↑
	Vishay	12-52	↑	↑	↔	↑
	STMicroelectronics	10-23	↑	↔	↔	↔
Wide Bandgap MOSFET's	Littlefuse	27-29	↔	↔	↔	↔
	Infineon	8-52	↔	↑	↔	↑
	ONSEMI	14-31	↔	↑	↔	↑
	STMicroelectronics	17-20	↑	↑	↔	↑
Rectifiers	Diodes Incorporated	12-24	↑	↑	↔	↑
	ONSEMI	20-24	↑	↑	↔	↑
	STMicroelectronics	14-16	↔	↔	↔	↔
	Vishay	8-10	↔	↑	↔	↑

Manufacturers expanded power device offerings: Diodes Incorporated launched high-current automotive MOSFETs (40–100 V) with copper-clip packaging for BLDC and DC-DC use; Toshiba added 600 V super-junction MOSFETs with fast-recovery diodes; Magnachip announced 650 V/1200 V IGBTs for inverters and energy storage; broad rectifier shifts continue across Asian and U.S. suppliers.

Passives

Factory Lines					Open Market	
Product	Brand	Lead time weeks	Prognosis	Pricing Trend	Availability	Pricing Trend
Capacitors	Kyocera	14-16	↔	↔	↑	↑
	ELNA	20-30	↔	↑	↑	↑
	EATON	10-20	↓	↔	↑	↑
	Vishay	12-14	↔	↔	↓	↑
Resistors	ROHM	8-10	↓	↔	↑	↑
	Samsung	44-46	↔	↔	↑	↑
	Panasonic	12-16	↔	↔	↑	↑
	Vishay	10-14	↔	↔	↓	↑
Inductors/Transformers	EATON	12-16	↓	↔	↔	↔
	Vishay	10-12	↔	↔	↔	↔
	Panasonic	23-25	↔	↔	↔	↔
	Murata	8-12	↔	↔	↔	↔
Surface Mount General Capacitors	TDK	16-20	↔	↔	↔	↔
	Samsung	20	↔	↔	↔	↔
	Kyocera	20	↔	↔	↔	↔
	Vishay	12-14	↔	↔	↔	↔
Aluminum Electrolytic	AiSHi	14-16	↔	↔	↔	↔
	Nichicon	22-30	↑	↔	↔	↔
	Panasonic	18-40	↔	↔	↔	↔
Filters	TDK	10-14	↔	↔	↔	↔
	Murata	12-16	↔	↔	↔	↔
	TAIYO YUDEN	15-17	↔	↔	↔	↔

Capacitor highlights include KEMET MLCC C1206C104J5RAC7800 parts and ongoing MLCC demand pressures. Viking Tech released precision thin-film resistors (AR03DTCX2050). Inductor innovations span customizable SMD power inductors from Shenzhen Gantong and advanced thin-film inductors from Murata and TDK for RF and automotive applications. Industry cost and supply signals persist.

Memory

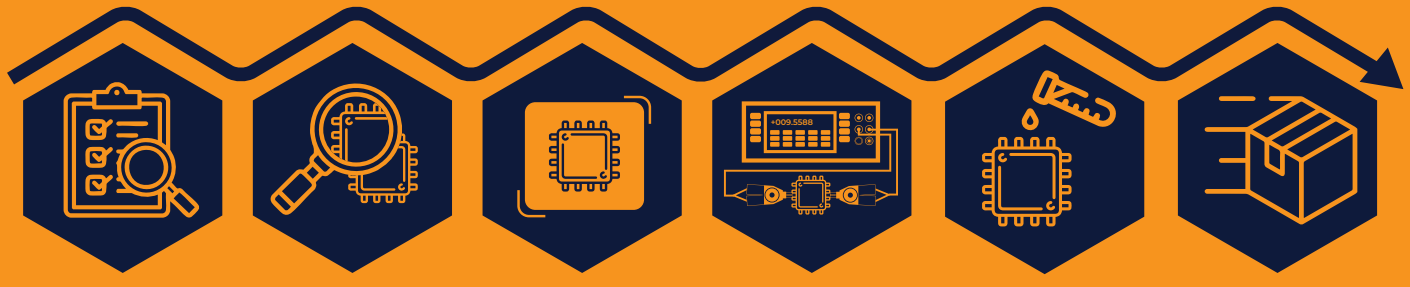
Factory Lines					Open Market	
Product	Brand	Lead time weeks	Prognosis	Pricing Trend	Availability	Pricing Trend
NAND Flash	Alliance Memory	8-24	↑	↑	↓	↑
	GigaDevice	12-26	↑	↑	↓	↑
	Macronix	30-52	↑	↑	↓	↑
NOR Flash	Alliance Memory	12-20	↑	↑	↓	↑
	GigaDevice	8-12	↑	↑	↓	↑
	Infineon	12-26	↑	↑	↓	↑
Memory Modules	Centon	26-52	↑	↑	↓	↑
	Kingston	6-12	↑	↑	↓	↑
	ADATA	26-52	↑	↑	↓	↑
	SMART Modular	26-52	↑	↑	↓	↑
SRAM	Renesas	14-28	↔	↑	↓	↑
	ONSEMI	20-40	↔	↔	↓	↑
	Microchip	4-11	↔	↔	↓	↑
	Alliance Memory	8-30	↑	↔	↓	↑
EEPROM	STMicro	12-14	↑	↑	↓	↑
	ONSEMI	12-20	↔	↔	↓	↔
	ROHM	4-25	↔	↔	↔	↔
	Microchip	4-25	↔	↔	↔	↔
NOR Flash	Microchip	4-26	↔	↔	↔	↔
	Renesas	12-14	↑	↑	↔	↑
	Infineon	12-26	↔	↔	↔	↔
	Alliance Memory	12-20	↑	↑	↓	↑

Factory Lines					Open Market	
Product	Brand	Lead time weeks	Prognosis	Pricing Trend	Availability	Pricing Trend
eMMC	ADATA	26-52	↑	↑	↓	↑
	Greenliant	20-26	↑	↑	↓	↑
	Alliance Memory	12-26	↑	↑	↓	↑
	Kingston	6-12	↑	↑	↓	↑
PC (Commodity) DRAM	Kingston	4-16	↑	↑	↓	↑
	Alliance Memory	2-20	↑	↑	↓	↑
Solid State Drives	Kingston	6-12	↑	↑	↓	↑
	Greenliant	20-26	↑	↑	↓	↑
	ADATA	26-52	↑	↑	↓	↑

Major memory suppliers like Samsung Electronics and SK hynix report Q1 results tied to DRAM, HBM, and NAND demand. Samsung raised DDR5/DRAM pricing and secured lucrative contracts; Micron Technology and SanDisk face structural tightness, with HBM and server memory prioritized over legacy DDR4/DDR3 supply.

Counterfit Detection

- Quality Control Process for Every Order
- ISO & AS Certifications
- 2 Year Warranty on All Products
- Supply Chain Transparency



Incoming Inspection | External Visual Inspection | X-Ray / XRF | Electrical Testing | Chemical & Destructive Test | Repackaging & Shipping

Logic & Digital

Factory Lines					Open Market	
Product	Brand	Lead time weeks	Prognosis	Pricing Trend	Availability	Pricing Trend
8 Bit MCU	Renesas	14-18	↔	↔	↔	↔
	Microchip	4-12	↑	↔	↔	↔
	STMicro	15-33	↑	↔	↔	↔
	NXP	16-39	↑	↔	↔	↔
32 Bit MCU	Infineon	10-97	↑	↔	↔	↔
	Microchip	4-18	↑	↔	↔	↔
	STMicro	15-28	↔	↔	↔	↔
	NXP	16-39	↔	↔	↔	↔
FPGA	Microsemi	8-32	↔	↔	↔	↔
	Efinix	19-36	↑	↔	↔	↔
USB	Infineon	12-16	↔	↔	↔	↔
	Microchip	6-12	↔	↔	↔	↑
Automotive	STMicro	40-52	↔	↔	↔	↔
	NXP	18-52	↔	↓	↔	↔
	Renesas	24	↔	↔	↔	↔
LCD's	Sharp	28	↔	↔	↔	↔
	WiseChip	14-16	↔	↔	↔	↔
	AZ Displays	12-14	↔	↔	↔	↔
SOM	iWaveSystems	16	↔	↑	↔	↑
	TechNexion	26	↑	↑	↔	↑

Manufacturers introduced diverse logic products: NXP and Infineon refreshed 8-bit MCU portfolios; Megawin and STMicroelectronics expanded 32-bit MCU lines; Trenz Electronic showcased new FPGA platforms including AMD Spartan UltraScale+ and Versal AI Edge Gen2; Gowin Semiconductor announced new Arora FPGA families; industrial TFT-LCD modules and embedded displays featured Q1 product upgrades.

Electromechanical

Factory Lines					Open Market	
Product	Brand	Lead time weeks	Prognosis	Pricing Trend	Availability	Pricing Trend
Relays	TE Connectivity	18-20	↔	↔	↔	↔
	Panasonic	14-30	↔	↑	↔	↑
	Infineon	40-52	↔	↑	↔	↑
	American Zettler	16-30	↔	↑	↔	↑
Switches	Panasonic	10-12	↔	↑	↔	↑
	TE Connectivity	10-12	↔	↑	↔	↑
	ZF Electronics	18-20	↔	↑	↔	↑
	Grayhill	12-24	↔	↑	↔	↑
Timing	Microchip	12-26	↔	↑	↔	↑
	Kyocera	12-28	↔	↑	↔	↑
	Epson	12-24	↑	↑	↔	↑
	Abracon	12-30	↔	↔	↔	↔
Fans	SUNON	24-26	↔	↔	↔	↔
	Qualtek	20-24	↔	↔	↔	↔
	BOYD	12-14	↔	↔	↔	↔
	ADDA	20-24	↔	↔	↔	↔
Power Supplies (AC/DC)	CUI Inc.	14-28	↔	↔	↔	↔
	MEAN WELL	14-17	↔	↔	↔	↔
	Murata PS	14-38	↔	↔	↔	↔
	Recom	16-18	↔	↔	↔	↔
Power Supplies (DC/DC)	Murata PS	10-18	↔	↔	↔	↔
	Recom	15-17	↔	↔	↔	↔
	Wall Industries	8-10	↔	↔	↔	↔
	CUI Inc.	11-28	↔	↔	↔	↔
PCB Connector	TE Connectivity	12-16	↔	↑	↔	↑
	Amphenol	8-10	↔	↑	↔	↑
	Adam Tech	16-18	↔	↑	↔	↑
	JST	16	↔	↔	↔	↔

Factory Lines					Open Market	
Product	Brand	Lead time weeks	Prognosis	Pricing Trend	Availability	Pricing Trend
Lightning Connectors	Kyocera	10-12	↔	↑	↔	↑
	TE Connectivity	12-16	↔	↑	↔	↑
	WAGO	14	↔	↔	↔	↔
Terminal Blocks & Crimps	TE Connectivity	12-16	↔	↔	↔	↔
	METZ Connect	10-16	↔	↑	↔	↑
	Wieland Electric	16	↔	↑	↔	↑
	Major League Electronics	6-8	↔	↔	↔	↔

New electromechanical parts include Omron P6K relay sockets and G6K low-signal relays, alongside Menlo Micro MEMS configurable switches targeting test equipment. Toshiba announced brush/BLDC motor control drivers. AutomationDirect added AchieVe LPPS and S18-1C mechanical pressure switches. Amphenol Corporation remains prominent with rugged connector and electromechanical product lines.

Memory Shortage

As of April 2026, the memory market has transitioned from a severe shortage into a period of extreme price volatility and structural scarcity. While early 2026 projections focused on capacity displacement, current data shows that High Bandwidth Memory (HBM) and Enterprise SSDs have effectively "cannibalized" the production lines of general-purpose DRAM and NAND.

1. Updated Market Dynamics (Q2 2026)

The supply gap has widened further than initially anticipated in January.

- **Price Surges:** DRAM contract prices are projected to rise 58–63% in Q2 2026 alone, while NAND Flash (SSD) prices may surge by up to 75%.
- **Extended Lead Times:** Procurement teams are now facing lead times of 40+ weeks for high-density RDIMM and enterprise configurations, threatening deployments well into 2027.
- **The 70% Inversion:** Analysts now estimate that AI data centers will consume approximately 70% of high-end DRAM in 2026, a historic inversion that leaves industrial and consumer sectors with minimal leftovers.

2. Competitive Landscape: The HBM4 Race

The supply gap has widened further than initially anticipated in January.

Manufacturer	Q2 2026 Status & Strategy	Impact on MRO/Procurement
SK Hynix	Fast-tracking the M15X fab for HBM4 mass production; 2026 capacity remains "sold out."	Primary driver of the "Memory Supercycle"; prioritizing hyperscalers.
Samsung	Accelerating P4 and P5 fab construction; P5 operational target moved up to late 2027.	Shifting from volume to "profitability-first"; leading price hikes in legacy nodes.
Micron	Acquired Taiwan's PSMC P5 fab to bypass U.S. construction delays; output to rise in 2027.	Focus on PCIe Gen5 SSDs and HBM4 is crowding out standard DRAM capacity.

3. Updated Market Dynamics (Q2 2026)

The shortage is no longer just a pricing issue; it is reshaping product lifecycles.

- **End of the Entry-Level PC:** Gartner predicts that the sub-$500 entry-level PC segment will effectively disappear by 2028 as memory costs now account for **23% of total Bill of Materials (BOM).**
- **Legacy EOL Acceleration:** Manufacturers are retiring older nodes (DDR4) faster than expected to free up space for HBM4, creating a critical shortage for long-lifecycle industrial systems.
- **Open-Ended Procurement:** Hyperscalers (Google, AWS, Meta) are reportedly purchasing all available supply regardless of price, forcing smaller OEMs to pay "spot market" premiums.

4. Revised Strategic Recommendations

Based on the current April 2026 outlook, procurement leaders should adjust their playbooks:

- **Phase Buying:** If deployments are not urgent, consider deferring purchases to H2 2026 when some analysts predict a minor stabilization (though not a price drop).
- **Under-Provisioning:** Some organizations are acquiring servers at half memory capacity now, planning for memory-only upgrades in 2027 to avoid peak Q2 2026 pricing.
- **Frequent Re-Quoting:** Due to weekly price adjustments, quotes older than 14 days should be considered obsolete.
- **Audit for HBF Transition:** Monitor the shift toward new memory types like High-Pass Filter (HBF), which is further fragmenting supplier resources.

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End of Life (EOL)

Texas Instruments

Product	EOL	Notes
DLPC300ZVB	Sep 2026	Part of TI's PDN; no recommended replacement published, customers should consult TI field sales for suitable alternate DLP controller options.
DLP2000AFQC	Sep 2026	No direct replacement offered, design teams should consider later DLP controllers in TI's portfolio or equivalent from other vendors.

Diodes Incorporated

Product	EOL	Notes
APX803L05-12C3-7	Mar 2026	Lifetime buy offered; Diodes suggests equivalent APX803 series parts (same family) for new designs where performance matches.
APX803L05-21W5-7	Mar 2026	Also EOL with lifetime buy; replacement options include updated APX803 variations with enhanced tolerance and packaging.

On Semiconductor

Product	EOL	Notes
MC34717	Apr 2026	Legacy PWM used in power supplies; typical replacement is the MC34933 family with expanded feature set and extended availability.
NB7V657	Jun 2026	Former high-performance buffer; replace with NB7V657M or comparable differential clock buffer recommended by Onsemi application notes.

NXP

Product	EOL	Notes
MC68HC908JB8	Jul 2026	NXP indicates legacy MCUs are being discontinued; suggested migration is to Kinetis MCX or i.MX RT series for broader ecosystem support.
MPC5554	Sep 2026	Classic automotive MCU based on legacy architecture; recommended transition is to newer MPC57xx or S32 automotive MCU families.

Microchip

Product	EOL	Notes
PIC18F458	Apr 2026	Legacy PIC18 core being phased out; replacement path is Microchip's PIC18F46K42 series with enhanced flash and peripherals.
MCP3008	May 2026	Classic 10-bit ADC in SPI interface; suggested upgrade is MCP3208 (12-bit) where higher resolution is acceptable.

End of Life (EOL)

STMicroelectronics

Product	EOL	Notes
STM8S103F3	Jun 2026	STM8 legacy series being transitioned; suggested replacement is the STM32G0 family with richer peripheral set and lower power.
L78L05	Jul 2026	Basic linear regulator line being consolidated; use LD1117 or LDOs in the STPOWER portfolio for improved performance.

Infineon

Product	EOL	Notes
TLE493D-A1B6	Aug 2026	Infineon has indicated older Hall sensor families are not in future forecasts; replacement is the TLE493D-A2B6 with better sensitivity.
IRLZ44N	Sep 2026	Classic logic-level MOSFET replaced in Infineon catalog by newer TrenchFET or OptiMOS devices delivering lower Rds(on) and better thermals.

Renesas

Product	EOL	Notes
RX610	May 2026	Older RX family variants are being phased out; suggested move is to RX65N/RX66T for enhanced connectivity and security.
μPD78F0730	Jun 2026	Classic 78K0 MCU; recommended path is RL78/G1x or RA series for future proof designs.

Vishay

Product	EOL	Notes
VS-1N4148	Mar 2026	Legacy diode superseded by 1N4148W with robust package and automated manufacturing support.
SI7469DP	May 2026	Older MOSFET generation being replaced with SiH series offering lower gate charge and improved efficiency in power applications.

Maxim Integrated (now ADI)

Product	EOL	Notes
MAX232A	Apr 2026	Classic interface IC; recommended replacement is MAX3232E with wider voltage range and ESD enhancements.
MAX809	Jun 2026	Discontinued; migration path is the MAX810/MAX811 family with tighter threshold tolerances.

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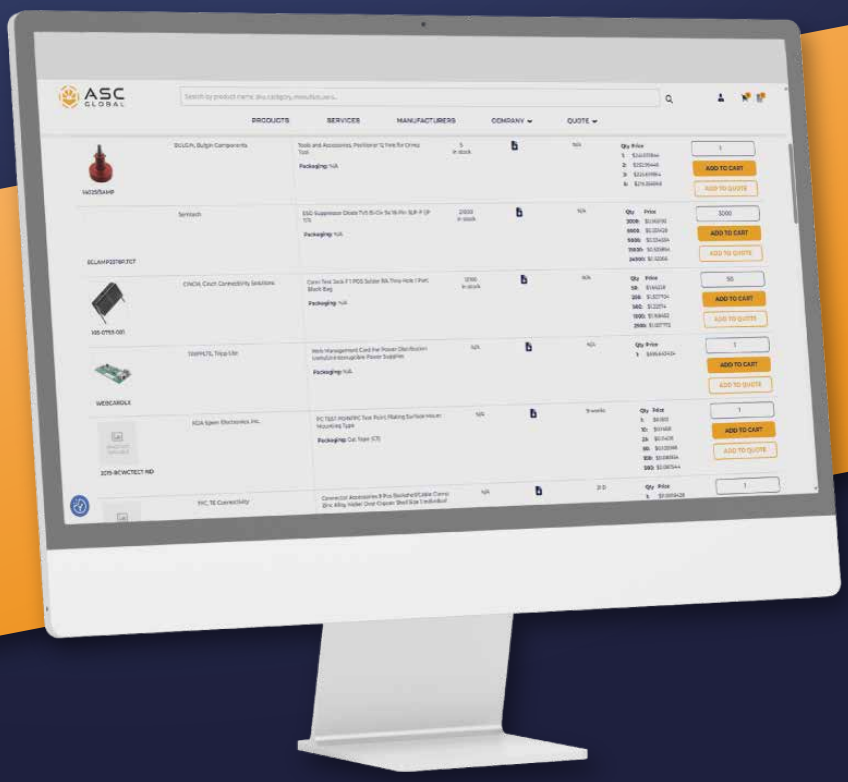

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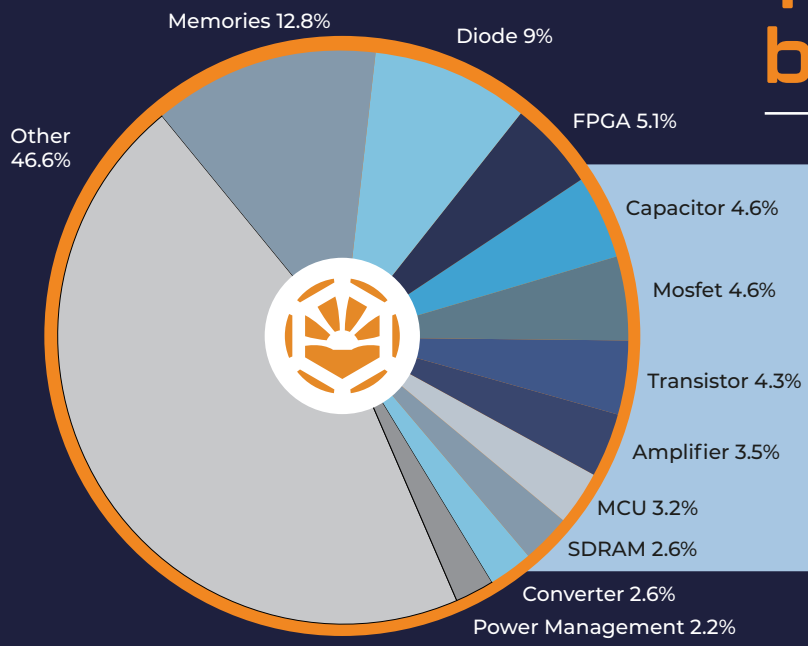
Test & Failure Rates

Test Rates by Device Type



Memory devices led monthly testing at 12.8%, followed by diodes (9%) and FPGAs (5.1%). Elevated memory inspections align with tightening supply and pricing pressure, indicating procurement vigilance. Moderate activity across passives and discretes reflects steady validation needs, while the 46.6% “Other” category signals broad, diversified component scrutiny across programs.

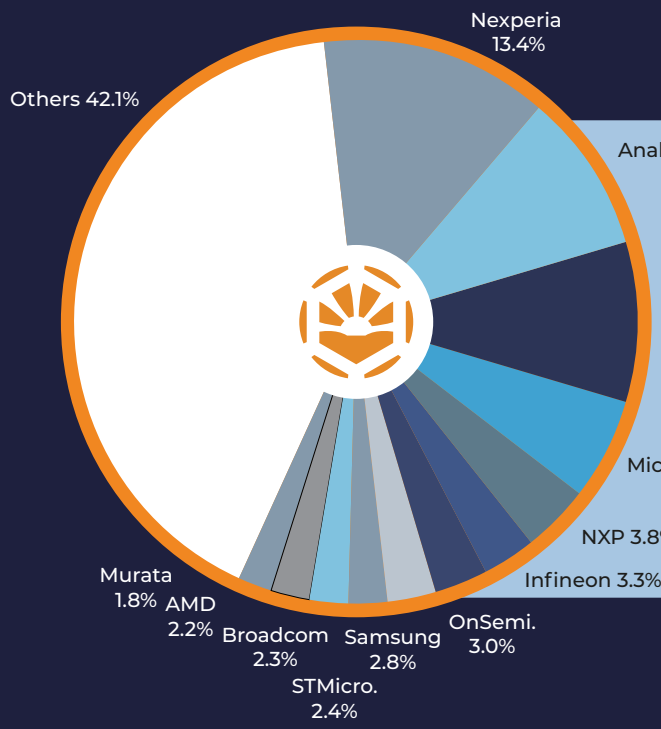
Top 10 Component Types by Failure Rate

Here’s a list of the top 10 device types most likely to fail our quality tests in December.

1. Clock
2. Diode
3. Codec
4. Interface
5. Crystals, Oscillators, Resonators
6. DC DC Converters
7. Ethernet
8. Transceiver
9. Capacitor
10. DC DC Switching Regulators

This ranking is determined by the proportion of failed results compared to the total units tested in each category. While some failures stem from aging or mishandling, others could indicate more serious quality issues or potential counterfeit threats.

Test Rates by Manufacturer



Testing concentrated around Nexperia (13.4%), well ahead of Analog Devices (7.1%) and Texas Instruments (5.3%). Elevated scrutiny of Nexperia parts reflects operational misalignment between its Chinese and Dutch units, prompting added validation. Broad coverage across other suppliers indicates diversified sourcing and risk-managed procurement.

Top 10 Manufacturers by Failure Probability

Regarding manufacturer origin, these ten brands recorded the highest test failure rates in December.

1. EPCOS
2. Renesas
3. Qorvo
4. Mini-Circuits
5. IXYS
6. NANYA/OMRON
7. Coilcraft
8. Xilinx
9. Vishay Dale
10. Broadcom Limited

This does not indicate widespread issues but suggests areas that may benefit from further supplier verification or risk mitigation measures.

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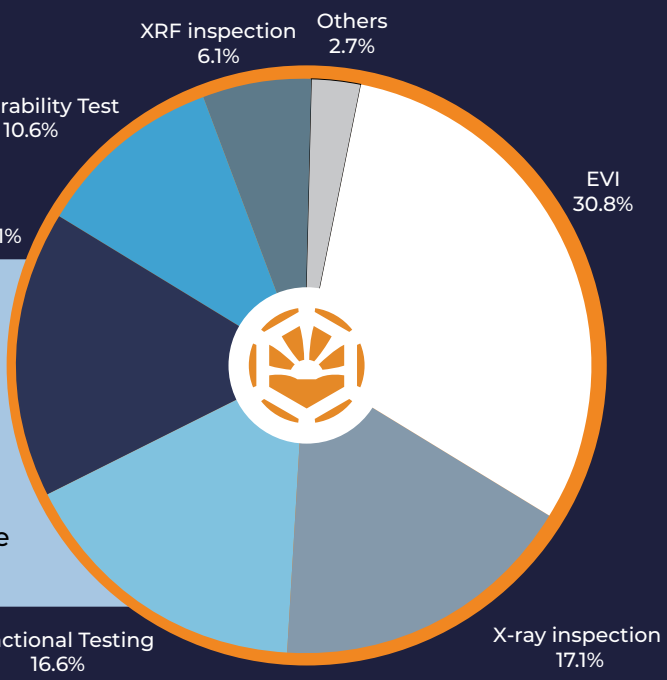
- Supply chain transparency
- Green sourcing

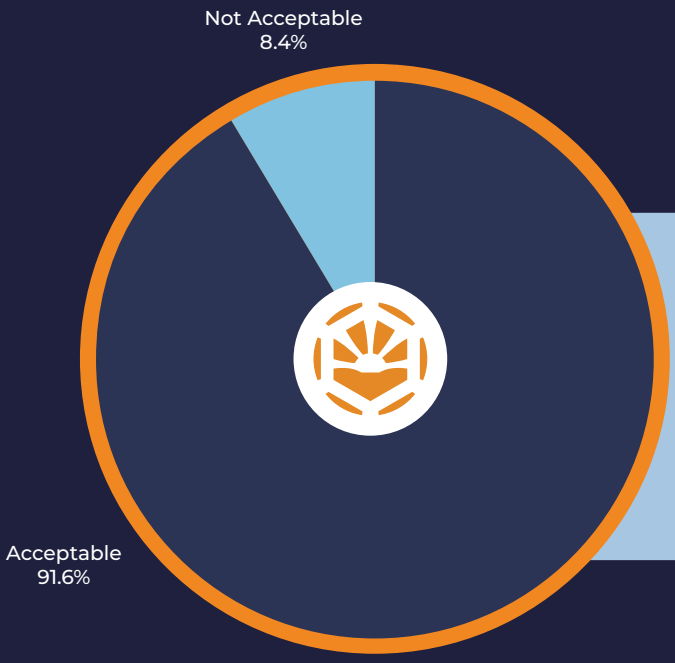
Test Types & Results

Test Types



February testing emphasized a layered verification strategy: EVI led at 30.8%, followed by X-ray (17.1%), functional testing (16.6%), and decap analysis (16.1%). Solderability and XRF added material assurance. This blend of rapid screening and deep inspection strengthened authenticity checks and long-term reliability confidence across incoming components.

Test Results



February results show 91.6% acceptable components, reflecting a stable, well-controlled quality environment across incoming lots. The remaining non-acceptable findings confirm persistent, category-specific risk best uncovered through targeted, in-depth inspection, reinforcing the value of rigorous screening and analytical validation before components enter production channels.

Nexperia Crisis

The internal conflict at Nexperia has escalated into a near-total operational divorce between its European headquarters and its Chinese subsidiary as of April 2026.

The following updates detail the supply chain risks and governance shifts based on the latest verified reports:

1. Operational "Blackout" and IT Sabotage

The governance breach moved from financial disputes to a direct technical confrontation in March 2026:

- **System Lockouts:** On March 3, 2026, Nexperia B.V. (Netherlands) implemented protective IT measures, disabling corporate accounts for staff in China. This blocked access to critical systems including Office 365 and SAP.
- **Governance Conflict:** Nexperia B.V. cited unauthorized IT actions by Chinese management, such as creating rogue email accounts and removing hard drives from company laptops, as the reason for the lockout.
- **Production Impact:** While Nexperia China claims to have restored basic production via contingency workarounds, Nexperia B.V. maintains that these "rogue" IT environments fall outside corporate compliance and security frameworks.

2. Pivot to 100% Domestic Chinese Production

To counter the European wafer blockade, the Chinese unit is aggressively decoupling from Western silicon:

- **Domestic Sourcing:** As of April 2026, Nexperia China is transitioning to 100% domestic wafers for key power switches (IGBTs and MOSFETs). Some production is already utilizing 12-inch domestic wafers, compared to the 8-inch wafers traditionally supplied from Germany.
- **Quality & Authenticity Risk:** Nexperia HQ continues to warn that it cannot validate the authenticity or automotive-grade (AEC-Q101) status of components produced in China using these non-validated local wafers.
- **Operational Capacity:** The Dongguan packaging facility is currently reported to be operating at approximately 60-70% capacity using stockpiles and alternative domestic suppliers.

3. Legal Deadlines and Global Realignment

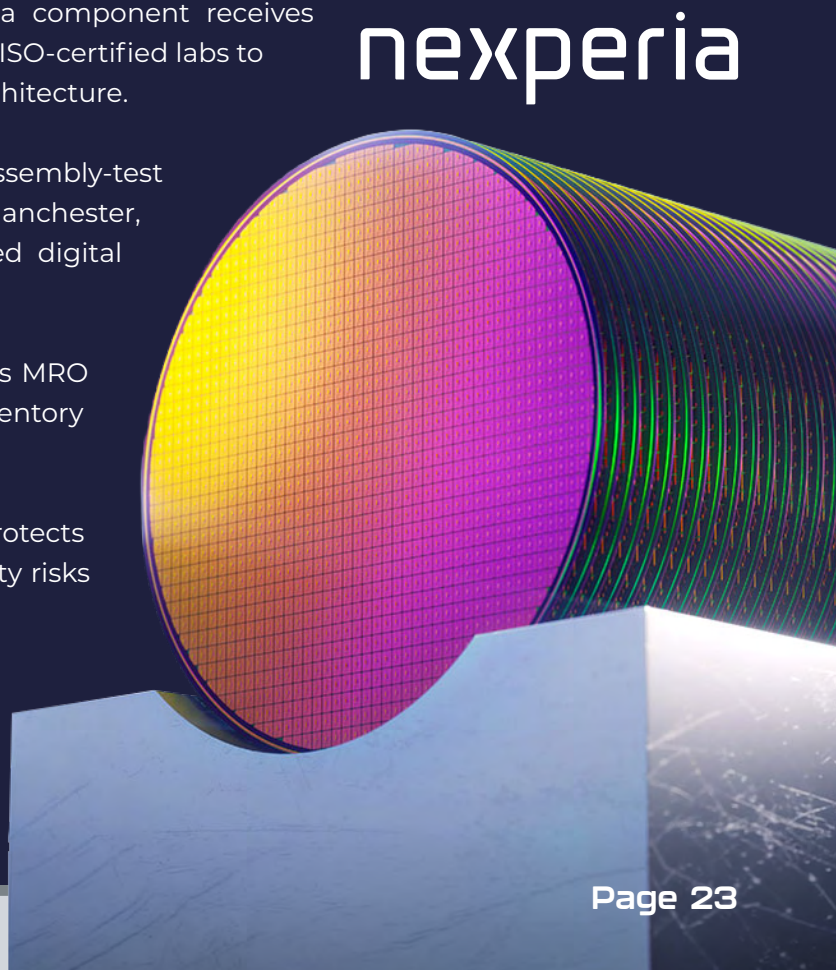
The dispute is reaching a critical legal turning point that may result in a permanent split:

- **International Arbitration:** Wingtech (the Chinese parent) initiated a six-month consultation period that expires on April 15, 2026. If no resolution is reached by this date, the case automatically proceeds to international arbitration, with potential claims reaching $8 billion.
- **The "Malaysia Shift":** Nexperia B.V. is fast-tracking a $300 million expansion in Malaysia. The strategic goal is to move roughly 90% of global production capacity out of China by mid-2026 to restore a "Western-validated" supply chain.
- **Court Investigation:** The Amsterdam Enterprise Chamber has upheld the suspension of Wingtech's founder, Zhang Xuezheng, and ordered a formal investigation into "mismanagement," which is expected to last through late 2026.

4. The ASC Global Advantage: Insulating Your Supply Chain

In an environment where "pseudo-Nexperia" parts (domestic Chinese silicon in branded housings) are entering the spot market, ASC Global provides a critical safety layer:

- **Rigorous Multi-Stage Testing:** Every Nexperia component receives electrical characterization and decapsulation in ISO-certified labs to verify die authenticity against original silicon architecture.
- **Full Traceability Validation:** Wafer-fab and assembly-test origins are manually confirmed in Hamburg, Manchester, or Malaysia, avoiding reliance on compromised digital records.
- **Guaranteed Authenticity:** ASC Global leverages MRO and automation networks to secure verified inventory despite steep premiums for validated stock.
- **Mitigated Liability:** Vetted sourcing protects engineering teams from field failures and quality risks linked to unverified lots.



Hot Commodities

Compiled from diverse sources, this data provides guidance. Treat it accordingly. ASC Global offers premier supply chain programs to mitigate market volatility. Contact your Account Manager for details.

- Analog
- Memory
- Power Products
- Logic & Digital
- Passives
- Electromechanical

ASC's Picks

Type	Product #	Manufacturer	Lead Time weeks	Pricing Trend	Prognosis
	ICM42688P	TDK	45	↔	↔
	MT41K256M16TW107ITP	Micron	37-53	↔	↔
	FT230XSR	FTDI	42	↔	↔
	MT41K256M16TW107P	Micron	53	↔	↔
	KLM8G1GETFB041	Samsung	2-4	↔	↔
	W25Q128JVSIQ	Winbond	24-32	↔	↔
	MT40A512M16LY062EITE	Micron	20-30	↔	↔
	MT40A512M16TB062ER	Micron	250	↔	↔
	MT41K128M16JT125K	Micron	20-50	↔	↔
	MT40A1G16TB062EITF	Micron	50-287	↔	↔
	MT40A1G16TB062EF	Micron	20-53	↔	↔
	THGBMTG5D1LBAIL	Kioxia	4-12	↔	↔

Product Updates

Integrated Circuits

IC demand is surging due to escalating AI and data-center workloads, driving logic fabs toward system-level integration and advanced nodes (2 nm+), especially from **TSMC** and **Samsung** as compute revenue skews to AI hardware.

Manufacturers like **Intel** and **Broadcom** are prioritizing custom ASICs and AI accelerators, reallocating capacity away from legacy nodes, which tightens supply for general-purpose ICs across consumer markets.

FPGA

The global FPGA market is poised for steady expansion in 2026, with major vendors **AMD (Xilinx), Intel (Altera)**, and **Microchip** benefitting from rising AI/ML, 5G infrastructure, and edge compute demand.

FPGA adoption accelerates in reconfigurable AI inference and telecom, with medium- and high-density devices capturing share as heterogeneous compute architectures proliferate.

Passives

Passive electronic components market is projected to reach $36 B in 2026 with 5.7% CAGR, supported by broad electronics output growth despite flat capacity expansion and pricing pressures.

Demand remains strong in automotive, industrial, and power conversion sectors as OEMs source higher reliability passives for EV and IoT platforms, offsetting consumer volatility.

eMMC

eMMC faces tighter NAND allocation as producers like **Samsung, SK hynix,** and **Micron** prioritize enterprise SSD and HBM production, pushing eMMC supply and pricing pressure in Q2 2026.

Consumer device manufacturers are increasing eMMC capacities in cost-sensitive segments despite constrained supply, driven by AI feature requirements and automotive/industrial storage demand.

RDIMM

DDR5 RDIMM adoption is being driven by AI and hyperscale cloud refreshes, with **Samsung, Micron,** and **SK hynix** fulfilling large-capacity server orders amid data-center memory bandwidth pressures.

Premium high-transfer-rate RDIMMs (≥6400 MT/s) command growth as **Rambus** and **Montage Technology** ramp advanced DDR5 interface silicon to support next-gen server CPUs and accelerators.

Product Updates

SSD

NAND flash prices are projected to jump ~70–75% QoQ in Q2 2026 due to heavy enterprise SSD demand, tightening client SSD availability and maintaining elevated ASPs.

Western Digital, Samsung, and **Kioxia** prioritize high-end enterprise SSD capacity for AI workloads, while client SSD purchasing remains supply-constrained and restocking.

HDD

HDD market growth is modest as enterprise workloads shift toward flash; nearline HDDs retain niche demand for massive archival storage but face price pressure versus SSD alternatives.

Seagate and **Western Digital** focus on high-capacity SMR/CMR nearline drives for cloud archival tiers, but long-term HDD declines persist against flash substitution trends.

Server CPU

Server CPU demand continues strong with **AMD EPYC** and **Intel Xeon** platforms anchored in AI/cloud deployments; data center chip market projected to surge toward multi-hundreds of billions by 2032.

AI-centric cores and security features promote server CPU differentiation, with cloud-service providers locking long-term supply deals to secure silicon in tight capacity environments.

GPU

GPU spending is heavily skewed to AI training/inference, with **NVIDIA** and **AMD** commanding data-center growth while consumer GPU volumes soften under reprioritized fab and packaging allocation.

Advanced GPU architectures demand HBM and advanced packaging from partners like **TSMC** and **Samsung**, reinforcing tight supply and sustained premium pricing for AI compute stacks.

Motherboards

Motherboard markets see mild recovery tied to server refresh cycles and workstation builds, even as PC consumer demand remains soft from inflated memory and CPU pricing.

OEMs such as **ASUS**, **Gigabyte**, and **MSI** adjust SKUs to higher-performance segments where premium chipsets for AI-ready platforms yield better margins amid component cost volatility.

Manufacturer Updates

SK Hynix

SK Hynix is dominating the HBM3E market and accelerating HBM4 development to meet ramping AI server demand. Supply remains extremely tight through Q2, with double-digit price increases expected for enterprise DRAM.

Samsung

Focusing on high-density DDR5 and liquid-cooled AI storage solutions. Samsung is reportedly weighing a double-digit MLCC price hike this April to offset rising raw material and logistics costs.

NXP

NXP is implementing a broad price adjustment effective April 1, 2026. These hikes reflect significant cost increases in raw materials and energy, specifically impacting automotive and industrial control product portfolios.

Intel

Intel is implementing CPU price hikes up to 30% this quarter due to supply chain tightening. Meanwhile, the $14.2B Fab 34 buyback reinforces their aggressive "IDM 2.0" foundry turnaround strategy.

Nvidia

Demand for Blackwell remains extraordinary as production ramps to full speed. Q2 2026 revenue guidance reflects a 50%+ year-over-year increase, driven by massive AI infrastructure build-outs and new automotive partnerships.

STMicroelectronics

Navigating a cautious industrial recovery. Strategic focus has shifted toward Silicon Carbide (SiC) expansion and integrated GaN solutions for EV power modules to capture long-term automotive design wins.

Microchip Technology

Facing a "high-stakes paradox" where AI demand peaks while traditional industrial sectors remain cautious. Focus is on managing inventory levels and navigating the shift from AI training to inference.

Infineon

Benefiting from dynamic AI power supply demand despite a subdued broader market. Q2 revenue is projected at $4.3B, with automotive and secure systems segments remaining stable amid infrastructure expansions.

Micron

Micron is currently benefiting from a structural shift in DRAM demand driven by AI data centers. With HBM supply sold out through 2026, focus shifts to scaling 1-beta node production.

Texas Instruments

TI has issued a major price hike notice for April 1, with some adjustments reaching up to 85% for specific analog power switches and related IC products.

Manufacturer Updates

AMD

AMD is gaining momentum with the MI450 launch looming. Analysts expect triple-digit revenue acceleration as their lower-power, cost-efficient AI accelerators become the preferred choice for diversifying data center operators.

TSMC

Transitioning to 2nm mass production, TSMC remains the sole provider for high-end AI silicon. Expect high utilization rates for 3nm/5nm nodes as Apple and Nvidia compete for limited wafer starts.

Lattice

Leading the low-power FPGA market, Lattice is seeing a 7.2% CAGR as edge computing and 5G expansion drive demand for SRAM-based FPGAs in industrial and telecommunications sectors.

Amphenol

Expected to generate $4.1B in additional sales following the CommScope acquisition. Growth is driven by the "electronics revolution" across mobile devices, defense, and high-speed data center interconnects.

Skyworks

Mobile RF remains steady, but Skyworks is pivoting toward IoT and Wi-Fi 7 standards to offset fluctuations in the premium smartphone market during the Q2 seasonal lull.

Qualcomm

Diversifying beyond handsets into automotive and PC AI. The Snapdragon platform is seeing increased adoption in "AI PCs," competing directly with x86 architectures in the enterprise laptop market.

Onsemi

Continuing leadership in Silicon Carbide for the energy sector. Q2 focuses on resilient supply for smart vehicle battery management and factory automation systems as electrification trends stabilize.

Renesas

Expanding its multi-billion dollar manufacturing partnership with GlobalFoundries. This secures long-term supply for automotive MCUs and industrial IoT SoCs, with tape-outs for new GF process technologies starting mid-2026.

Vishay

Stable demand for discrete semiconductors and passive components. Vishay is expanding capacity for high-reliability resistors and inductors targeted at 5G infrastructure and specialized aerospace applications.

GlobalFoundries

Reinforcing U.S. domestic production through its Renesas collaboration. GF is focusing on BCD and CMOS technologies with non-volatile memory to power next-generation intelligent vehicle and industrial systems.

Earnings Recap

Automotive

Toyota Motor Corp.

- Revenue: $84.51 B (+3.5% YoY)
- Net income: $5.80 B
- Net Profit Margin: 6.9%

Volkswagen Group

- Revenue: $82.10 B (-4.7% YoY)
- Net income: $2.31 B
- Net Profit Margin: 2.8%

Tesla, Inc.

- Revenue: $23.15 B (-7.1% YoY)
- Net income: $0.80 B
- Net Profit Margin: 3.4%

The 2026 automotive landscape is a volatile frontier where legacy manufacturers struggle with margin erosion from aggressive trade tariffs and cooling EV demand, while simultaneously racing to integrate generative AI and software-defined architectures into production lines to survive a hyper-competitive market increasingly dominated by high-tech, cost-efficient regional challengers.

AI and Data Center

Microsoft Corp.

- Revenue: $44.06 B (+69% YoY)
- Net Income: $18.77 B
- Net Profit Margin: 42.6%

NVIDIA Corp.

- Revenue: $64.51 B (+14% YoY)
- Net Income: $27.30 B
- Net Profit Margin: 42.3%

Alphabet Inc.

- Revenue: $91.55 B (+16% YoY)
- Net Income: $25.40 B
- Net Profit Margin: 27.7%

The AI landscape has shifted from experimental modeling to massive infrastructure industrialization, as hyperscalers commit record capital expenditures toward custom silicon and liquid-cooled data centers. Sovereign AI initiatives and enterprise-grade agentic workflows are driving sustained demand, even as investors scrutinize the immediate profitability of multi-billion-dollar hardware investments.

Earnings Recap

Automation Industry

Siemens AG
- Revenue: $22.68 B (+8% YoY)
- Net Income: $2.45 B
- Net Profit Margin: 10.8%

ABB Ltd
- Revenue: $9.05 B (+9% YoY)
- Net Income: $1.27 B
- Net Profit Margin: 14.0%

Rockwell Automation
- Revenue: $2.11 B (+12% YoY)
- Net Income: $0.32 B
- Net Profit Margin: 15.1%

The automation landscape is defined by "autonomous orchestration," where AI-driven software seamlessly integrates industrial robotics with real-time supply chain data. Amidst global labor shortages and reshoring initiatives, companies are prioritizing flexible, modular manufacturing systems and digital twins to achieve resilient, high-margin production that can instantly adapt to shifting geopolitical trade pressures.

Consumer and Personal Computing

Apple Inc.
- Revenue: $143.80 B (+16% YoY)
- Net Income: $42.10 B
- Net Profit Margin: 29.3%

HP Inc.
- Revenue: $23.38 B (+5% YoY)
- Net Income: $0.97 B
- Net Profit Margin: 4.1%

Dell Technologies
- Revenue: $14.40B (+6.9% YoY)
- Net Income: $0.50 B
- Net Profit Margin: 3.5%

The 2026 personal computing landscape is defined by the "AI-PC Supercycle," where hardware refresh cycles are driven by on-device generative AI capabilities rather than traditional spec bumps. Despite rising component costs for memory and silicon, premiumization and high-margin services are offsetting volume fluctuations as consumers prioritize privacy-centric, ambient digital assistants.

Industry Updates

Apple Faces Chip Shortage

Apple reported a critical shortage of "binned" A18 Pro chips this April following the unexpected sales success of the MacBook Neo. With TSMC production lines at maximum capacity, procurement teams are monitoring potential price hikes or model discontinuations for entry-level hardware.

New Security Export Controls

The US Congress approved the Chip Security Act this April to combat systemic export control evasion. This landmark legislation mandates tracking technology be embedded directly into silicon, potentially reshaping global AI hardware distribution by requiring strict hardware-level transparency for all advanced semiconductor shipments.

Middle East Logistic Risks

Conflict escalation in the Middle East has triggered severe maritime disruptions through the Strait of Hormuz this April. Buyers should anticipate extended lead times for Asian components as carriers reroute shipments, leading to record-high freight rates and increased energy costs for semiconductor fabrication plants.

Defense Component Costs Rise

Geopolitical instability in the Middle East has driven defense-grade component costs up by 8% this April. Increased logistics expenses and commodity price shifts are pressuring margins, leading buyers to prioritize long-term contracts with established Tier-1 suppliers to secure essential semiconductor inventory.

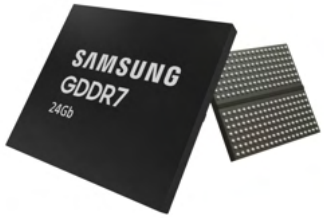
Industry Updates

Intel Joins Terafab Project

Intel officially joined Elon Musk's Terafab AI chip project this April to manufacture processors for humanoid robotics and space-based data centers. This partnership leverages Intel's advanced 18A manufacturing nodes, aiming to produce one terawatt of compute power annually for future autonomous systems.

Samsung DRAM Prices Up 30% Q2

Samsung is increasing DRAM prices by approximately 30% for the second quarter of 2026 across all segments, following negotiations with key customers, driven by strong memory demand, including HBM for AI servers and DRAM for PCs and mobile devices.



TSMC Accelerates Arizona GigaFab Cluster Build-Out

TSMC plans major Arizona GigaFab cluster to rival capacity in Taiwan with up to 12 fabs, two advanced packaging plants, and a roughly $500 billion investment, boosting U.S. chip production despite higher costs and labor challenges.

SUMCO Delays Two Silicon Wafer Fab Projects, Focuses on Upgrades

Japanese wafer supplier SUMCO delays construction of two planned silicon wafer fabs due to structural shifts in the semiconductor market, prioritizing upgrades at existing facilities to address rising AI demand and tighter quality requirements while reducing expected government subsidies.

ASC GLOBAL

MANUFACTURING CAPABILITES

Benefits

- **Cost Savings:** Enjoy competitive prices on all your supply chain needs and additional rebates on bulk purchases.
- **Reduced risk:** Improve your supply chain resilience by increasing the sources for your vital components.
- **Better service:** Better technical support, faster turnaround times, or more flexible ordering options.

Products

Passive

- LED Components
- Fuses
- Circuit Breakers
- Switches
- Capacitors
- EMI Filters
- Photo Controls
- Relays
- Resistor
- Thermistor

Semiconductors

- Coin Batteries
- Cylindrical Batteries (Acoustic and Haptic technology)
- Sensor components
- Diodes
- Regulator

Drop-In Replacements

Kingbright | Cree LED | AMS | OSRAM | Lite-On | Broadcom Limited | Lumileds | Ledil | Luminus Devices | Mersen | Littelfuse | Eaton/Bussmann

Industry Applications

- Automotive
- Industrial
- Medical Devices
- Consumer Electronics
- Aviation
- Marine
- Power Supply
- Lighting
- New Energy
- Telecommunication
- Home Appliances
- Security Protection
- Power Trip
- Networking

MARKET REPORT

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Marketing & Data Analysis Team
ASC Global

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- Consumer Electronics
- Energy
- Industrial
- Medical

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Global presence while providing unparalleled customer service. 9 offices strategically placed in major regions of the global electronic economy.

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Italy
Hungary

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Hong Kong

SINGAPORE*

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Guadalajara, Jalisco

INDIA*

*Offices coming soon

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