MARKET REPORT Q4 2025

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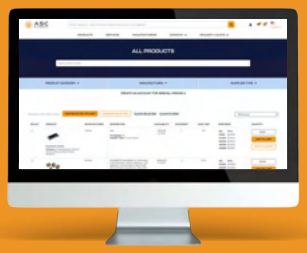

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Table of Contents

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
Sensors	onsemi	18-52	↔	↔	↔	↔
	Vishay	24-52	↔	↔	↑	↔
	Melexis	12-60	↔	↔	↔	↔
	TE Connectivity Sensors	16-52	↔	↔	↔	↔
Switching Regulators	MPS	12-24	↔	↔	↔	↔
	Microchip	8-20	↔	↔	↔	↔
	STMicroelectronics	10-22	↔	↓	↔	↔
	Onsemi	10-20	↔	↔	↔	↔
Timing	Onsemi	22-32	↑	↔	↑	↔
	Microchip	7-12	↔	↔	↔	↔
	Renesas	12-24	↔	↔	↔	↔

Factory Lines					Open Market	
Product	Brand	Lead time weeks	Prognosis	Pricing Trend	Availability	Pricing Trend
Interface	NXP	16-20	↔	↔	↔	↔
	Renesas	14-18	↔	↔	↔	↔
Amplifiers and Data Converters	Microchip	4-10	↔	↔	↔	↔
	Onsemi	10-16	↔	↔	↑	↔
	Renesas	12-18	↔	↔	↔	↔
	STMicroelectronics	10-16	↔	↔	↔	↔
Analog and Power for Automotive (CAN/LIN/ Smart FET)	STMicroelectronics	16-18	↔	↔	↔	↔
	NXP	16-20	↔	↔	↔	↔
Multi-source Analog/ Power	Onsemi	10-18	↔	↔	↔	↔
	STMicroelectronics	10-18	↔	↔	↔	↔

Analog Devices introduced several new products between May and July 2025, enhancing its portfolio in precision signal processing and power management. These innovations aim to address the growing demand for high-performance analog solutions in various applications, including automotive and industrial sectors.

Power

Factory Lines					Open Market	
Product	Brand	Lead time weeks	Prognosis	Pricing Trend	Availability	Pricing Trend
IGBT's	STMicroelectronics	14-20	↑	↔	↔	↔
	Littelfuse	13-60	↔	↔	↔	↔
	Microchip	14-26	↑	↔	↔	↔
	Infineon	10-42	↑	↔	↔	↔
High Voltage MOSFET's	Infineon	9-49	↑	↔	↔	↔
	Littelfuse	29-52	↔	↔	↔	↑
	Microchip	4-26	↑	↔	↔	↔
	STMicroelectronics	13-26	↑	↔	↔	↔
Low Voltage MOSFET's	Infineon	8-39	↑	↔	↔	↔
	ONSEMI	6-42	↑	↔	↔	↑
	Vishay	8-40	↑	↔	↔	↔
	STMicroelectronics	13-26	↑	↔	↔	↔
Wide Bandgap MOSFET's	Littlefuse	20-29	↔	↔	↔	↔
	Infineon	12-40	↑	↔	↔	↔
	ONSEMI	6-20	↑	↔	↔	↔
	STMicroelectronics	32-45	↔	↔	↔	↔
Rectifiers	Diodes Incorporated	8-13	↔	↔	↔	↔
	ONSEMI	7-12	↓	↔	↔	↔
	STMicroelectronics	14-16	↔	↔	↔	↔
	Vishay	8-10	↔	↔	↔	↔

Navitas Semiconductor announced plans to commence 200mm GaN (Gallium Nitride) production in collaboration with PSMC. This strategic move is expected to strengthen their supply chain, drive innovation, and improve cost efficiency, supporting GaN's integration into AI data centers, electric vehicles, solar energy systems, and home appliances.

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	↓	↔	↔	↔
	Wurth Elektronik	18-20	↔	↔	↔	↔
	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	12-16	↔	↔	↔	↔
	Murata	12-16	↔	↔	↔	↔
	TAIYO YUDEN	12-14	↔	↔	↔	↔

Murata released high-voltage multilayer ceramic capacitors for industrial automation. TDK introduced precision resistors for automotive and consumer electronics. Vishay expanded film capacitors, Yageo launched miniaturized inductors for IoT, and Samsung Electro-Mechanics unveiled compact passive solutions for 5G and high-speed electronics applications.

Memory

Factory Lines					Open Market	
Product	Brand	Lead time weeks	Prognosis	Pricing Trend	Availability	Pricing Trend
Memory Modules	Centon	6-8	↔	↑	↓	↑
	Kingston	6-12	↑	↑	↓	↑
	ADATA	6-8	↑	↑	↔	↑
	SMART Modular	12-18	↔	↑	↓	↑
SRAM	Renesas	14-28	↔	↑	↓	↑
	ONSEMI	20-40	↔	↔	↔	↑
	Microchip	4-11	↔	↔	↔	↑
	Alliance Memory	8-30	↔	↔	↓	↑
EEPROM	STMicro	12-14	↑	↑	↑	↑
	ONSEMI	12-20	↔	↔	↓	↔
	ROHM	8-12	↔	↔	↔	↔
	Microchip	4-25	↔	↔	↔	↔
NOR Flash	Microchip	4-26	↔	↔	↔	↔
	Renesas	12-14	↔	↔	↔	↔
	Infineon	12-26	↔	↔	↔	↔
	Alliance Memory	12-20	↔	↔	↓	↑
eMMC	ADATA	6-8	↑	↑	↔	↔
	Greenliant	12-18	↑	↑	↔	↔
	Alliance Memory	8-12	↑	↑	↔	↑
	Kingston	6-16	↑	↑	↔	↑
PC (Commodity) DRAM	Kingston	4-16	↑	↑	↔	↑
	Alliance Memory	2-20	↑	↑	↔	↑

Factory Lines					Open Market	
Product	Brand	Lead time weeks	Prognosis	Pricing Trend	Availability	Pricing Trend
Solid State Drives	Kingston	4-8	↑	↑	↑	↑
	Greenliant	8-16	↑	↑	↑	↑
	ADATA	8-12	↑	↑	↑	↑

SK hynix showcased its next-generation HBM4 memory at SEMICON Taiwan 2025, highlighting advancements in high-bandwidth memory technology. This development underscores the industry's focus on enhancing memory solutions to meet the increasing demands of AI and data center applications.

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	10-24	↑	↔	↑	↔
	NXP	13-39	↔	↔	↔	↔
32 Bit MCU	Infineon	10-26	↔	↔	↓	↔
	Microchip	4-18	↑	↔	↔	↔
	STMicro	13-16	↔	↔	↑	↔
	NXP	13-39	↔	↔	↔	↔
FPGA	Microsemi	8-32	↔	↔	↓	↑
	Efinix	19-21	↔	↔	↔	↔
USB	Infineon	12-16	↔	↑	↔	↑
	Microchip	6-10	↔	↔	↔	↑
Automotive	STMicro	40-52	↔	↔	↔	↔
	NXP	18-52	↔	↔	↔	↔
	Renesas	24	↔	↔	↔	↔
LCD's	Sharp	28	↔	↔	↔	↔
	WiseChip	14-16	↔	↔	↔	↔
	AZ Displays	12-14	↔	↔	↔	↔
SOM	iWaveSystems	16	↔	↔	↔	↔
	TechNexion	8-16	↔	↔	↔	↔

The Semiconductor Industry Association's July 2025 report revealed that logic and memory segments are expected to grow by 29% and 17%, respectively, in 2025. This upward revision reflects stronger-than-expected performance in the first half of the year, driven by advancements in AI and data processing technologies.

Electromechanical

Factory Lines					Open Market	
Product	Brand	Lead time weeks	Prognosis	Pricing Trend	Availability	Pricing Trend
Relays	TE Connectivity	12-14	↔	↔	↔	↔
	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	12-30	↔	↔	↔	↓
	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	↔	↔	↔	↔

TE Connectivity launched high-reliability connectors for robotics and automation. Omron introduced rugged relays for industrial environments, Panasonic expanded low-power switches and sensors, Honeywell added electromechanical actuators for machinery, and Molex released modular connectors for rapid deployment in manufacturing setups.

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End of Life (EOL)

Analog Devices

Product	EOL	Replacement	Impact on Operations
ADP2443	Feb 2026	ADI alternative FETs as suggested in PDN	Medium – may require minor redesign or component substitution in power circuitry
ADXL335	Jul 2025	ADI MEMS accelerometer family alternatives	High – sensor calibration and firmware may need updates

Infineon

Product	EOL	Replacement	Impact on Operations
SGW25N120	Sep 2025	IGW25N120H3 (Infineon recommended successor)	High – IGBT replacement may require thermal and gate drive adjustments
IGW25N120H3	Dec 2025	Newer IGW-series FET/IGBT family (successor)	Medium – mostly drop-in, verify electrical characteristics

Siemens

Product	EOL	Replacement	Impact on Operations
S7-300 System	Oct 2025	SIMATIC S7-1500 / ET 200SP family	High – full PLC migration, software, and I/O reconfiguration required
ET 200M I/O Modules	Oct 2025	ET-200SP / S7-1500 modules	High – I/O layout changes and PLC program updates needed

Allen-Bradley / Rockwell

Product	EOL	Replacement	Impact on Operations
RSLogix 5	Dec 2025	Studio 5000 / ControlLogix migration path	High – software migration, program conversion, and training required
PLC-5 Modules	Dec 2025	ADI MEMS accelerometer family alternatives	High – hardware and software reconfiguration

Omron

Product	EOL	Replacement	Impact on Operations
G8N-1 DC12 Relay	Sep 2025	G8NB family replacements	Medium – check mechanical footprint and electrical ratings
G8N-17LR DC12 Relay	Sep 2025	G8NB-17R / G8NB family replacements	Medium – may require minor board layout adjustment

End of Life (EOL)

Renesas

Product	EOL	Replacement	Impact on Operations
ISL95837HRZ	Jul 2025	Renesas VR family recommended replacements	Medium – voltage regulator replacement may require testing and firmware adjustments
R5F100LEAFB#30	Aug 2025	RL78 MCU family replacements	High – firmware changes likely; PCB pin compatibility to be verified

Maxim Integrated (ADI)

Product	EOL	Replacement	Impact on Operations
MAX232	Sep 2025	Newer RS-232 / ADI recommended transceivers	Low – mostly drop-in replacements, verify voltage levels
MAX485	Sep 2025	Newer IGW-series FET/IGBT family (successor)	Low – pin-compatible, minor firmware or termination check

ON Semiconductor

Product	EOL	Replacement	Impact on Operations
MC74VHC1GT50	Jun 2025	SIMATIC S7-1500 / ET 200SP family	Low – drop-in logic replacement
NC7SZ00	Aug 2025	ET-200SP / S7-1500 modules	Low – minimal operational impact

STMicroelectronics

Product	EOL	Replacement	Impact on Operations
STM32F030F4P6	Jun 2025	STM32 newer MCU families	High – firmware, software, and possible PCB changes
LD3985	Aug 2025	STM32-compatible LDO or newer ST regulators	Medium – check voltage and thermal specifications

Vishay

Product	EOL	Replacement	Impact on Operations
SMD0204	Jun 2025	Newer resistor array series from Vishay	Low – drop-in replacement, minor testing recommended
BC846BS	Aug 2025	Small-signal transistor series from Vishay	Low – mostly drop-in, confirm voltage/current ratings

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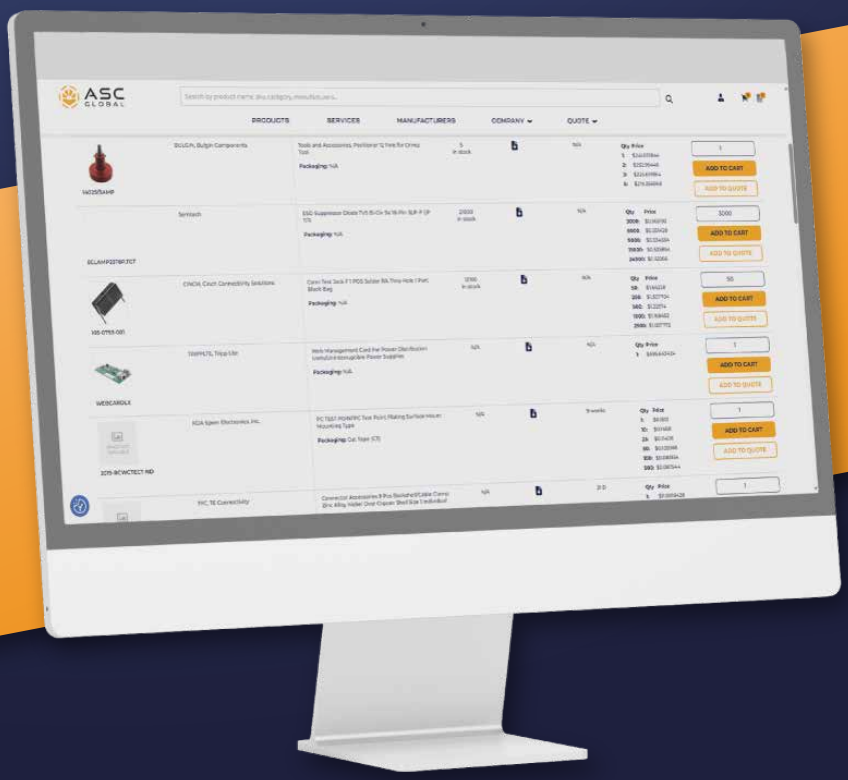

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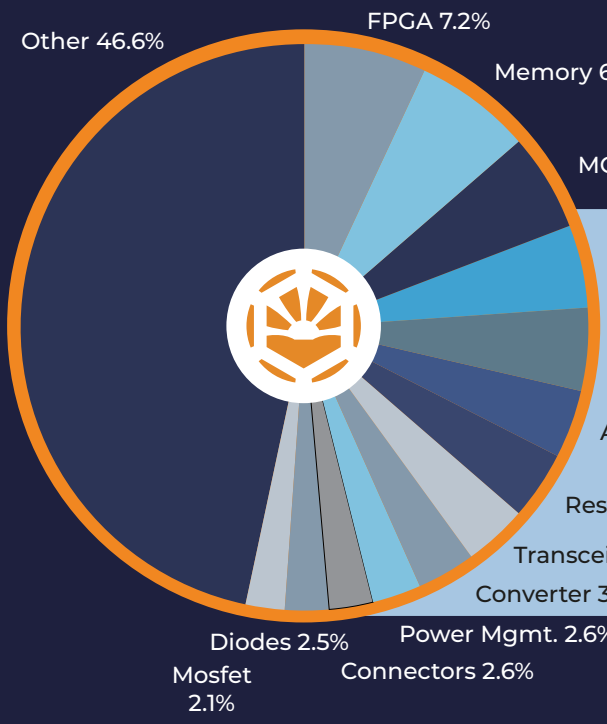
Test & Failure Rates



By Device Type

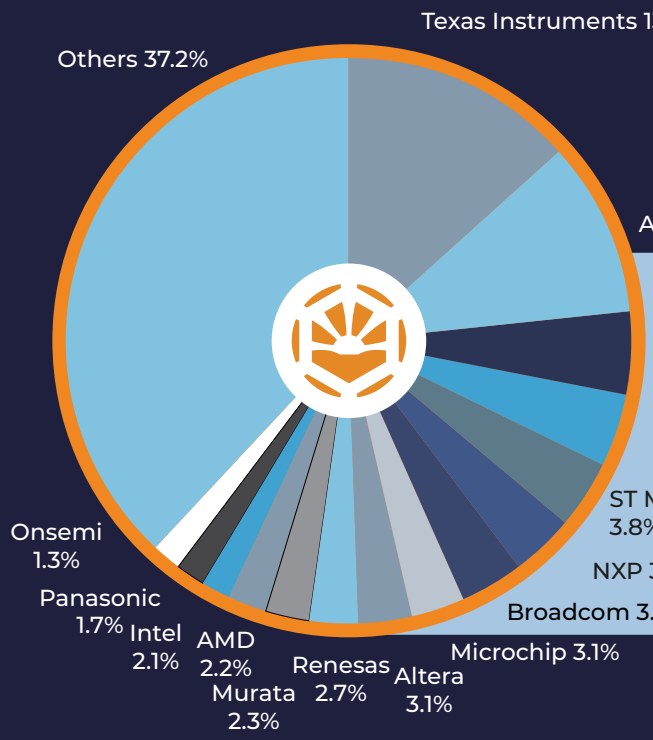
In Q3 2025, FPGAs (7.2%) and memory ICs (6.5%) registered the highest test rates, underscoring their importance in AI and data processing. MCUs (5.6%), capacitors (4.8%), and RF devices (4.7%) followed, reflecting strong demand in industrial automation, communications, and high-performance computing environments.

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 July.

1. Rectifiers
2. Discrete Semiconductor Products
3. Passive-Resistor
4. Digital Signal Processing (DSP)
5. Converter
6. Inductor
7. DC Converters
8. Processor
9. FPGA
10. CPLD

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.



By Manufacturer

In Q3 2025, Texas Instruments (13.2%) and Analog Devices (9.9%) led test rates, reflecting their dominance in analog and power solutions. Xilinx (4.5%) and Infineon (4.1%) followed, while STMicroelectronics (3.8%) and NXP (3.6%) highlighted continued strength in automotive, industrial, and high-performance computing applications.

Top 10 Manufacturers by Failure Probability

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

1. Panasonic Electronic
2. TDK Corporation
3. Lattice
4. Vicor Corporation
5. Skyworks
6. IXYS
7. AMD
8. Samsung
9. Renesas
10 Infineon

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

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Driving Electronic Sustainability

- Energy-efficient operations
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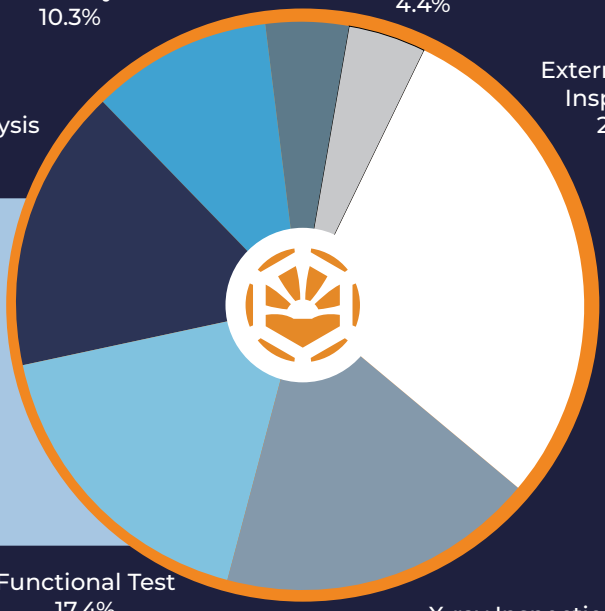
- Supply chain transparency
- Green sourcing

Test Types & Results

Test Types

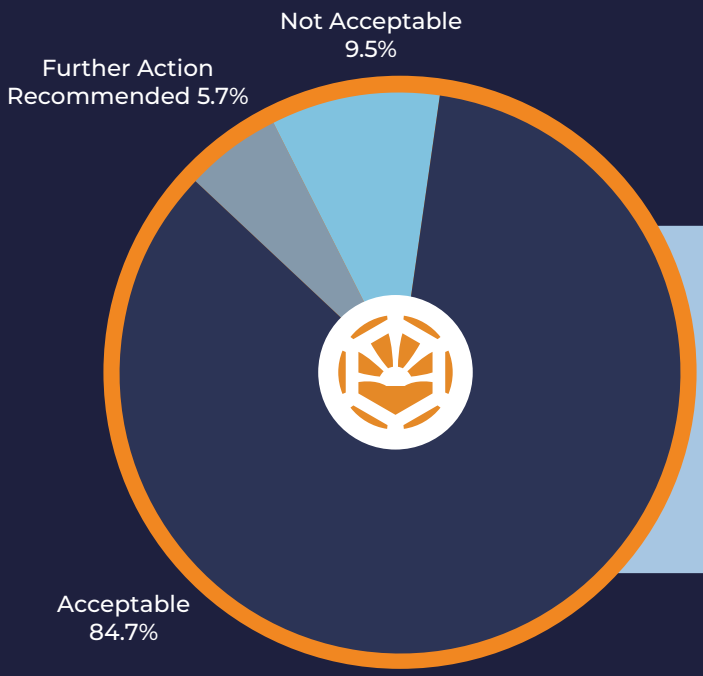
In Q3 2025, External Visual Inspection (29.1%) dominated testing, followed by X-ray Inspection (18%) and Functional Test (17.4%). Decap & Die Analysis (16.1%) highlighted deeper reliability checks, while Solderability Testing (10.3%) and XRF (4.7%) ensured compliance across aerospace, automotive, and advanced computing applications.



Test Results

In Q3 2025, 84.7% of tested components were deemed acceptable, while 5.7% required further action and 9.5% failed quality standards.

Although most parts passed, nearly 1 in 7 demanded closer scrutiny, underscoring persistent reliability concerns in critical supply chains.



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
	ADXL355BEZ	Analog Devices	39	↔	↔
	ADXL357BEZ	Analog Devices	39	↔	↔
	MT40A1G16TB062EITF	Micron	20	↔	↔
	MT40A1G16TB062EF	Micron	30	↔	↔
	BCM59131B0KMLG	Broadcom	10-18	↔	↔
	MT40A512M16TB062ER	Micron	24	↔	↔
	XCF04SVOG20C	AMD	12-18	↔	↔
	88E1512A0NNP2I000	Marvell	26	↔	↔
	WTB24Q	AirBorn	12-18	↔	↔
	ULN2803ADWR	Texas Instruments	10-18	↔	↔
	MB86M21APBSA001ME1	Fujitsu	12-18	↔	↔
	FT230XSR	FTDI	27	↔	↔

Product Updates

Integrated Circuits

Texas Instruments, ADI, and NXP prioritize analog/power ICs and fab upgrades, securing automotive windows; lead-time pressure persists, with logic/programmable ICs easier to source than memory and passive lines.

Maxim Integrated launches extended automotive-qualified ICs, TI extends industrial portfolios, and ADI offers long-term allocation agreements for OEMs to secure critical IC supply.

FPGA

AMD/Xilinx and Intel segment supply: commodity families stable, but UltraScale+ and automotive-grade face long allocations; OEMs encouraged toward early commitments and partner boards to secure FPGA capacity.

Lattice Semiconductor provides low-power automotive FPGAs, AMD and Xilinx prioritize hyperscaler/telecom allocations, creating a two-tier supply between commodity and high-end SKUs.

Passives

Murata, TDK, and Yageo expand high-value dielectric and MLCC production, prioritizing automotive/industrial allocations; Murata begins new 0402 47µF MLCC runs, reinforcing constrained specialty product availability.

KEMET adds automotive capacitor production, Murata and TDK reinforce wafer capacity, while OEMs adopt multi-vendor sourcing and blanket purchase strategies to manage lead-time risks.

eMMC

Samsung and flash vendors maintain eMMC for legacy and embedded designs; EOL notices and capacity shifts push OEMs to secure multi-source deals or migrate toward eUFS solutions.

Samsung and Micron offer lifecycle support and managed allocations for 4–128GB eMMC SKUs; OEMs encouraged to qualify replacements early for uninterrupted supply.

RDIMM

Samsung, SK Hynix, and Micron prioritize DDR5 RDIMMs for AI workloads; high-density modules (96/128GB+) constrained, with allocation programs driving longer lead times in general channels.

Kingston, Samsung, and Micron release validated MCRDIMM and high-capacity SKUs; OEMs encouraged to secure allocations as production ramps fluctuate.

Product Updates

SSD

Samsung, Western Digital, and Micron release PCIe Gen-5 consumer and enterprise SSDs; production favors nearline/AI-optimized models to offset HDD limits, accelerating sampling and production of performance SKUs.

Intel, Samsung, and WD provide enterprise SSD allocation programs; partner stocking and qualification windows mitigate short-term procurement risks.

HDD

Seagate and Western Digital advance nearline platforms with HAMR Mozaic 40TB drives sampling, broader commercial release phased after customer qualifications complete.

Seagate, WD, and Toshiba prioritize hyperscaler allocations; AI/warm-storage demand extends lead times, delaying commercial rollout of newest platters.

Server CPU

Intel and AMD extend Xeon and EPYC families, channeling production toward AI/cloud deployments while offering OEM validation programs to smooth datacenter platform integration.

Intel, AMD, and Fujitsu bundle validated platforms with extended support for OEMs, smoothing integration and prioritizing hyperscaler design wins.

GPU

NVIDIA prioritizes Blackwell rollout in hyperscaler/cloud channels, steering GB/GB200/GB300 capacity toward OEM builds; high-end SKUs show extended allocation timelines.

NVIDIA and AMD coordinate GPU+server platforms with ODMs; modular procurement required to secure slots, while hyperscalers receive first allocations.

Motherboards

ASUS, MSI, and Gigabyte release refreshed platforms supporting Wi-Fi 7 and PCIe Gen-5; high-end E-ATX boards staged for Ryzen/Intel launches with selective OEM allocation.

ASRock, ASUS, and Gigabyte provide validated board+CPU bundles and firmware updates; OEMs adopt early qualification to mitigate supply risks on premium SKUs.

Manufacturer Updates

SK Hynix

SK hynix has completed development of HBM4 preparing for mass production of this next-generation memory product aimed at ultra-high-performance AI applications.

Samsung

Samsung has reduced the price of its 2nm wafers to $20,000, undercutting TSMC's $30,000 price by 33%, to ensure utilization of its 2nm production capacity amid heightened

Micron

Micron has projected higher-than-expected revenue for Q1 2026, driven by growing demand for its high-bandwidth memory (HBM) products amid the global AI boom.

Intel

Intel has approached TSMC to explore potential investments or partnerships, aiming to secure external investments amid ongoing challenges in the competitive chip industry.

Nvidia

Nvidia is focusing on AI and data center applications with strong demand for its GPUs driving production and supply chain adjustments to meet market needs.

STMicroelectronics

STMicroelectronics is advancing next-generation chip manufacturing technology with a new PLP pilot line in Tours, France, aiming to enhance its packaging capabilities.

Microchip Technology

Microchip is focusing on AI data centers, aerospace & defense, and connectivity for growth, targeting inventory reduction from 261 days to 130-150 days.

Infineon

Infineon is focusing on automotive and industrial applications with lead times for both high- and low-voltage MOSFETs trending longer, currently around 12–22 weeks.

NXP

NXP is embracing a "China-for-China" strategy aligning with Chinese policy mandating that at least 25% of automotive chips used by domestic manufacturers be produced locally by 2025.

Texas Instruments

Texas Instruments is focusing on analog and embedded processing products, with lead times for some components experiencing increases, reflecting strong demand in industrial and automotive sectors.

Manufacturer Updates

AMD

AMD is prioritizing high-performance computing AI, and server applications, scaling production of its latest processors and GPUs. Lead times for key products are rising as global demand for AI workloads continues surging.

TSMC

TSMC is preparing to launch next-generation 2-nanometer chips in early 2026, targeting AI, smartphone, and HPC applications, with initial deliveries planned next year and supply chain adjustments underway to manage demand.

Lattice

Lattice is focusing on low-power programmable logic devices for edge computing applications, with lead times for some components experiencing increases due to strong demand.

Amphenol

Amphenol is expanding interconnect solutions for automotive, industrial, and high-speed data applications, with lead times extending for high-demand connectors and cable assemblies amid strong market adoption.

Skyworks

Skyworks is focusing on RF solutions for 5G, IoT, automotive, and industrial markets, with lead times extending due to high demand and constrained production capacity for key components.

Qualcomm

Qualcomm is prioritizing mobile processors, automotive SoCs, and IoT connectivity solutions, with lead times increasing as demand grows for smartphones, connected vehicles, and industrial wireless applications.

Onsemi

Onsemi is concentrating on power management and sensing solutions for automotive and industrial applications, with MOSFET lead times around 12–16 weeks due to growing adoption and production demand.

Renesas

Renesas is focusing on microcontrollers, analog, and automotive semiconductor solutions, with lead times for select MCUs and analog devices extending due to demand from EVs and industrial automation.

Vishay

Vishay is emphasizing passive components, including resistors, capacitors, and rectifiers, for automotive and industrial applications, with lead times currently ranging from 14 to 22 weeks due to strong demand.

GlobalFoundries

GlobalFoundries has announced a $16 billion investment to expand its semiconductor manufacturing and advanced packaging capabilities across its facilities in New York and Vermont, aiming to accelerate AI growth.

Earnings Recap

Automotive

Magna International

- Revenue: $10.06 billion (–8.2% YoY)
- Net income: $146 million
- Adjusted EPS: $0.78 (–28% YoY)

Bosch Group

- Revenue: $535.9 million (+6.2% YoY)
- Net profit: $79.8 million (+8.6% YoY)
- Net profit margin: $54.9 million (–11.6% YoY)

TE Connectivity

- Revenue: $4.53 billion (+14% YoY)
- Adjusted EPS: $2.27
- Adjusted EBIT margin: ~25%

The global automotive sector faces challenges in 2025, with U.S. sales projected at 16.02 million units, a slight decline from the previous year. Continental AG anticipates a significant financial impact from U.S. tariffs, estimating a "high double-digit million-euro" hit in the second half of the year.

AI and Data Center

NVIDIA

- Revenue: $39.3 billion (+12% QoQ, +93% YoY)
- Data Center Revenue: $35.6 billion (+16% QoQ, +93% YoY)
- Net Income: $2.94 per diluted share (+147% YoY)

Dell

- Revenue: $23.9 billion (+7% YoY)
- Operating Income: $2.16 billion (+40% YoY)
- Net Income: $1.53 billion (+27% YoY)

Super Micro Computer

- Revenue: $5.8 billion (+143% YoY)
- Net Income: $195 million
- Non-GAAP EPS: $0.41

The AI and data center industries are experiencing robust growth. OpenAI reported $4.3 billion in revenue for the first half of 2025, a 16% increase from the previous year. Simultaneously, data center development financing is reaching record levels, with an estimated 10 GW of capacity projected to break ground globally in 2025.

Earnings Recap

Automation Industry

Rockwell Automation

- Revenue: $2.1 billion
- Adjusted EPS: $2.82
- Adjusted EBIT Margin: 21.2%

Siemens

- Revenue: $22.47 billion (+0.9% YoY)
- Net Profit: $2.21 billion
- Orders: $24.76 billion (+8.4% YoY)

Schneider Electric

- Revenue: $11.52 billion (+12.5% YoY, organic)
- Adjusted EBITA Margin: 19.2%–19.5%

The automation industry is witnessing steady investment in 2025. North American companies ordered 17,635 robots valued at $1.094 billion in the first half of the year, with automotive OEMs leading the growth. Additionally, the global industrial automation and control systems market is projected to reach $226.8 billion in 2025, up from $206 billion in 2024

Consumer and Personal Computing

Microsoft

- Revenue: $76.4 billion (+18% YoY)
- Operating Income: $34.3 billion (+23% YoY)
- Net Income: $27.2 billion (+24% YoY)

Apple Inc.

- Revenue: $94.04 billion (+10% YoY)
- Net Income: $23.43 billion (+10% YoY)
- Earnings Per Share (EPS): $1.57 (+12% YoY)

HP Inc.

- Revenue: $13.93 billion (+3.1% YoY)
- Earnings Per Share (EPS): $0.75

The consumer and personal computing industry is experiencing moderate growth. Retail dollar sales in the U.S. consumer technology market grew 1.5% in the first half of 2025. The global PC market is projected to reach $222.64 billion in 2025, with a compound annual growth rate of approximately 9.10% through 2030

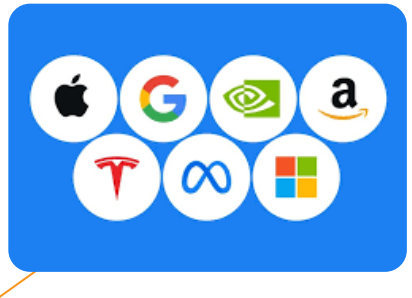
Industry Updates

NVIDIA, OpenAI Launch $100B Partnership

NVIDIA and OpenAI unveiled a $100 billion partnership to deploy 10 gigawatts of AI data center capacity, starting in 2026. The collaboration aims to power next-generation AI models, autonomous systems, and large-scale applications, positioning both companies at the forefront of AI infrastructure development and innovation.

Magnificent Seven Faces Emerging Rivals

The “Magnificent Seven” (Alphabet, Amazon, Apple, Meta Platforms, Microsoft, NVIDIA and Tesla) tech stocks no longer fully dominate AI investing. New players, Broadcom, Oracle, Palantir, TSMC, are emerging as market leaders. Performance diverges within the original group, signaling a potential rotation. As AI spreads across industries, Wall Street anticipates shifts in leadership and concentrated trades may end abruptly.

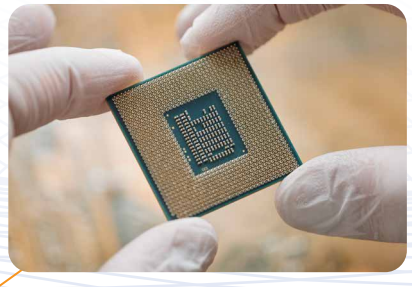


AMD Partners with OpenAI on AI Infrastructure

Semiconductor maker AMD will supply its upcoming Instinct MI450 chips to OpenAI, providing up to 6 gigawatts of computing power for next-generation AI infrastructure. The deal includes a warrant for OpenAI to acquire up to 10% of AMD’s stock, signaling efforts to diversify beyond Nvidia’s dominance.

U.S. Considers Tariffs Based on Chip Density

The U.S. government is considering a new tariff policy targeting imported electronic devices based on the number and estimated value of the chips they contain. This proposal could significantly affect a wide range of electronics, from wearables to high-end servers, by introducing tiered tariffs, potentially 25% for chip-dense products and 15% for imports from Japan or the EU.



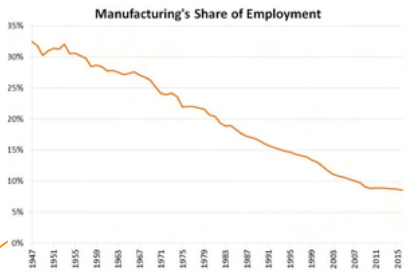
Industry Updates

U.S. Launches Tariff Probes on Medical Equipment

The U.S. Commerce Department initiated national security investigations under Section 232 concerning imports of medical devices, robotics, and industrial machinery, potentially leading to tariffs on a broad range of goods such as face masks, syringes, infusion pumps, surgical gloves, N95 respirators, wheelchairs, hospital beds, and specialized medical equipment like pacemakers and MRI machines.

U.S. Manufacturing PMI Declines to 49.1%

The U.S. Manufacturing Purchasing Managers' Index (PMI) dropped to 49.1% in September 2025, indicating a contraction in the manufacturing sector. This decline reflects challenges such as increased raw material prices and ongoing supply chain issues.

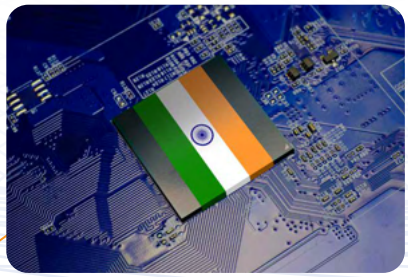


Tesla, Apple Explore Glass Substrate Chips

Tesla and Apple are testing glass substrates to enhance advanced chip performance. Taiwanese makers are conducting trials, while mass production remains unachieved. Advantages include stability and AI speed boosts, but manufacturing challenges like cracking and process limitations persist.

Indian State Approves Electronics Manufacturing Policy

The Uttar Pradesh government in India approved the Uttar Pradesh Electronics Component Manufacturing Policy-2025 (UP ECMP-2025) to enhance the state's role as a global hub for electronics manufacturing. The policy targets the production of 11 key electronic components, such as displays, camera modules, and multilayer PCBs, aiming to attract significant investment and create numerous jobs.



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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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ASC GLOBAL

Your MRO Supplier with Global Access to Hard-to-find, Obsolete, & End-of-Life Parts

INDUSTRIES SERVED

- Automotive Aerospace & Marine
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- Semiconductor & Technology
- Construction Industry
- Oil & Gas + Energy & Utilities
- Chemical Processing
- Metals, Mining and Infrastructure
- Food & Beverage
- Healthcare & Life Sciences
- Consumer Packaged Goods

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