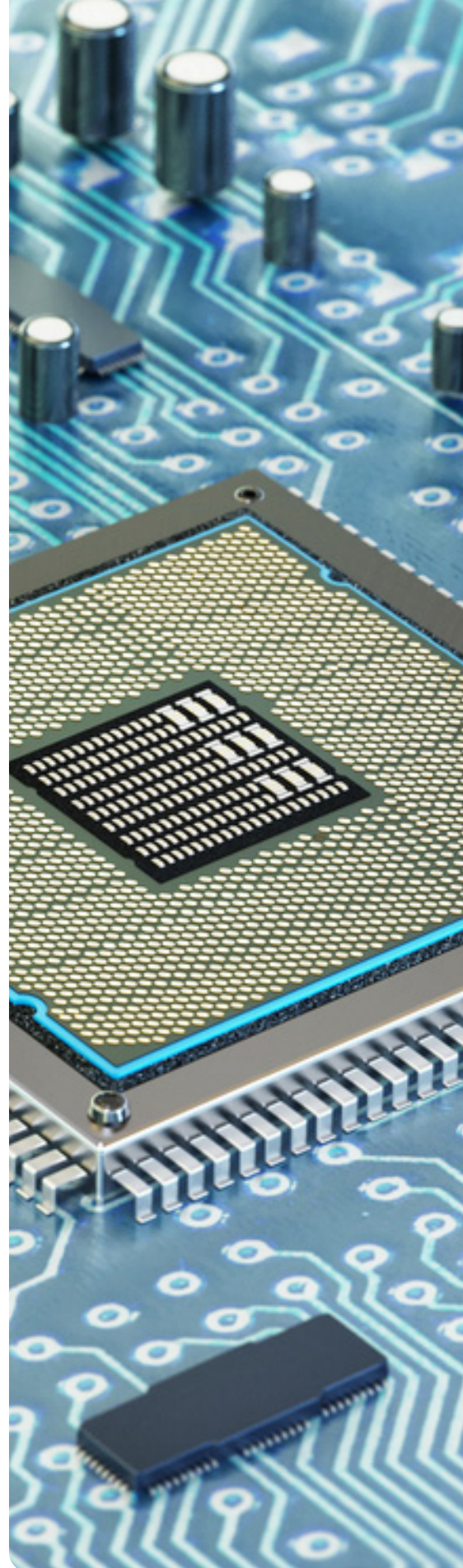


Q2 2026 Lead Time Report

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Constraints squeeze the chip market



Geopolitics and AI are driving up lead times and prices

The electronic components market continues to be shaped by a growing divide between AI-driven infrastructure demand and more traditional end markets. While the market, in general, is experiencing a return to normal growth unaffected by glut or shortage, accelerating investments in AI deployment is causing pockets of extreme tightness. As expected, AI remains the primary growth engine behind the industry's current

trajectory. According to PwC, semiconductors serving AI applications are projected to be the fastest-growing segments of the market through 2030. As organizations continue deploying larger AI models, demand is expanding into other segments, such as power.

Memory remains allocation only

Volatile and non-volatile memory remain at the center of this shift. Above all, HBM demand continues to absorb significant manufacturing capacity. Concerns around a possible strike at Samsung exploded in the 11th hour of negotiations, with industry experts warning of rising prices and shortage risk. Luckily, a government-mediated deal kept the strike from union members walking out.

However, even with the strike's cancellation, memory availability has not eased. Recent industry reports indicate NAND revenues have reached record levels as AI server deployments accelerate. SK Hynix chairman, Chey Tae-won repeated his earlier comments in a news conference on June 2, saying that he expects memory's supply-demand tightness to persist through 2030.

This sustained demand could lead to price increases for end users in automotive, retail, and consumer electronics.

“The real-world impacts of these trends have already begun to show themselves and threaten to deteriorate rapidly if the situation is not remedied.”

REUTERS



AI + geopolitics cause constraints across market segments

The influence of AI demand is also becoming increasingly visible in adjacent component categories. Growing electricity requirements associated with AI deployments are further increasing investment in power conversion, thermal management, and connectivity infrastructure.

Simultaneously, geopolitical influences are contributing to price adjustments as raw material costs grow. Over the last several months, rising raw material prices, specifically for helium, naphtha, tungsten, and bromine, have spiked concerns among suppliers.

Southeast Asian chip-makers, including TSMC, Samsung, and SK Hynix, depend on critical material imports from the Middle East, where geopolitical conflict has impacted everything from oil to logistics through the Strait of Hormuz.

Price adjustments due to increased costs from raw materials, logistics, and AI demand have been plentiful since the start of 2026. It's expected that more will come throughout the second half of the fiscal year, especially since AI demand and geopolitical instability show no sign of stabilization.

Broad growth and stability across the market outside of AI

Logic devices, embedded processors, sensors, and optoelectronics continue to exhibit balanced supply-demand fundamentals. There are of course pockets of extreme tightness, such as the ongoing FPGA shortage, but years of widespread inventory correction and capacity expansions have helped restore stability to many categories.

Looking ahead, the market is expected to remain fundamentally healthy but increasingly segmented. Products supporting AI infrastructure and high-performance computing are likely to experience stronger demand, longer lead times, and firmer pricing than the broader market.

A person wearing a white lab coat, a white face mask, and a white hairnet is working in a laboratory. They are using a blue pipette to transfer liquid into a small container. The background is a blurred laboratory setting with various equipment and a blue wall.

RAW MATERIAL INFLATION
IS CAUSING UPWARD PRICE
TRENDS.

**AI DEMAND CONTINUES
TO IMPACT VARIOUS
SEGMENTS.**

SEMICONDUCTOR MARKET TRENDS

Volatile Memory

Future Lead Times Increasing ↑

Price Increasing ↑

Legacy DRAM remains under pressure as suppliers continue shifting capacity toward higher-margin HBM and DDR5 products. Broad allocation activity is prompting continued upward pricing pressure. With AI infrastructure demand expected to remain strong, memory markets are likely to stay constrained through the coming quarter.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
SRAM, pSRAM	Infineon	12 - 52 weeks <i>Allocation</i>	↑	↑
	Renesas	12 - 22 weeks <i>IDT increasing prices</i>	↔	↔
	ISSI	22 weeks <i>Tight demand</i>	↑	↑
DRAM, RDRAM	ISSI	30 - 42 weeks	↑	↑
	Kingston	30 - 42 weeks <i>Allocation</i>	↑	↑
	Micron	52 weeks <i>Allocation</i>	↑	↑
	Samsung	30 - 42 weeks <i>Prices up</i>	↑	↑
DDRII, DDR3, DDR5	Micron	52 weeks <i>Allocation + DDR2 stable</i>	↑	↑
	Samsung	20 - 28 weeks <i>DDR5 allocation only</i>	↑	↑
	ISSI	52 weeks <i>Allocation only</i>	↑	↑
	Kingston	24 - 42 weeks <i>Allocation on DDR4 + DDR5</i>	↑	↑
DDR4, LPDDR4	Micron	52 weeks <i>Allocation</i>	↑	↑
	Samsung	26 - 34 weeks <i>Prices up</i>	↑	↑
	ISSI	52 weeks <i>Allocation only</i>	↑	↑

SEMICONDUCTOR MARKET TRENDS

Non-Volatile Memory

Future Lead Times Increasing ↑

Price Increasing ↑

AI-driven data center expansion and enterprise storage demand continue to strengthen NAND markets. Lead times and pricing are trending upward as suppliers prioritize higher-value storage applications. While not as tight as the volatile memory segment, non-volatile suppliers could see more allocation only contracts if demand outpaces available production capacity.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
Flash-NOR	ISSI	28 weeks	↑	↑
	Infineon	12 - 26 weeks Allocation	↑	↑
	Macronix	32 weeks	↑	↑
	Micron	26 weeks	↑	↑
Flash-NAND	Delkin	52 weeks Allocation	↑	↑
	Macronix	32 weeks	↑	↑
	Microchip	20 - 26 weeks	↑	↑
	Micron	26 weeks Allocation	↑	↑
	Western Digital	14 - 16 weeks	↑	↑
FRAM, NVRAM	Infineon	12 - 16 weeks	↑	↑
	STMicroelectronics	14 - 20 weeks	↑	↑
EEPROM	Microchip	20 - 26 weeks	↑	↑
	Onsemi	12 - 20 weeks	↑	↑
	Renesas	12 - 16 weeks	↔	↔
	STMicroelectronics	10 - 14 weeks	↑	↑

SEMICONDUCTOR MARKET TRENDS

Storage

Future Lead Times Increasing ↑

Price Increasing ↑

Storage markets continue to tighten under AI infrastructure expansion plans and data center deployments. Allocation activity is increasing across several suppliers, extending lead times and supporting higher pricing as buyers compete for available capacity. This comes as no surprise, as enterprise SSDs have seen an increase in demand over the last quarter.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
eMMC	ISSI	20 weeks <i>Allocation</i>	↑	↑
	Kingston	24 - 26 weeks <i>Allocation</i>	↑	↑
	Macronix	30 weeks	↑	↑
	Western Digital	22 - 24 weeks	↑	↑
SSD	Kingston	24 - 26 weeks <i>Allocation</i>	↑	↑
	Micron	52 weeks <i>Allocation</i>	↑	↑
	Samsung	26 - 52 weeks <i>Allocation</i>	↑	↑
	Western Digital	14 - 16 weeks	↑	↑
Cards	Western Digital	14 - 16 weeks	↑	↑

SEMICONDUCTOR MARKET TRENDS

Discrete

Future Lead Times Increasing ↑

Price Increasing ↑

Discrete markets are experiencing gradual tightening as demand from AI infrastructure and ongoing geopolitical influences impact pricing. While most product families remain available, with long lead times, allocations and price increases are emerging across select MOSFET, power, and wide-bandgap device categories. Additionally, increasing costs due to raw materials and logistics are having a wide-reaching impact on multiple suppliers.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
Diodes	Diodes Inc.	20 - 28 weeks	↑	↑
	Nexperia	52 weeks	↑	↔
	Onsemi	20 - 24 weeks <i>Allocation SOD123</i>	↑	↑
	MCC	12 - 24 weeks	↑	↔
	Toshiba	12 - 14 weeks	↑	↑
	Vishay	12 - 20 weeks	↑	↑
Bi-polar	Diodes Inc.	20 - 28 weeks	↑	↑
	Infineon	20 - 24 weeks	↑	↑
	MCC	12 - 24 weeks	↑	↔
	Onsemi	14 - 18 weeks	↑	↑
	STMicroelectronics	16 - 18 weeks	↑	↑

DISCRETE TRENDS

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
Small Signal	Diodes Inc.	20 - 28 weeks	↑	↑
	Nexperia	18 - 22 weeks	↑	↔
	Onsemi	14 - 18 weeks <i>Allocation SC-59</i>	↑	↑
	STMicroelectronics	14 - 18 weeks	↑	↔
	MCC	12 - 24 weeks	↑	↔
	Vishay	8 - 20 weeks	↑	↑
MOSFETs	Diodes Inc.	20 - 28 weeks	↑	↑
	Infineon	20 - 28 weeks <i>Price increase July 1</i>	↑	↑
	Nexperia	18 - 22 weeks	↑	↑
	Onsemi	16 - 18 weeks <i>Allocation SC-70, SC88</i>	↑	↑
	STMicroelectronics	16 - 18 weeks	↑	↑
	MCC	52 weeks	↑	↔
	Toshiba	12 - 14 weeks	↑	↑
	Vishay	8 - 20 weeks	↑	↑
TVS, Protection	Diodes Inc.	20 - 24 weeks	↑	↑
	Nexperia	10 - 14 weeks	↑	↔
	Onsemi	16 - 20 weeks	↑	↑
	STMicroelectronics	14 - 18 weeks	↑	↔
	MCC	12 - 14 weeks	↑	↔
	Toshiba	12 - 14 weeks	↑	↑
	Vishay	8 - 20 weeks	↑	↑

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	8 - 20 weeks	↑	↑
Power WBG	Infineon	52 weeks <i>Price increase July 1</i>	↑	↑
	Onsemi	14 - 20 weeks	↑	↑
RF	Microchip	14 - 22 weeks	↑	↔
	Infineon	20 - 24 weeks <i>Price increase July 1</i>	↑	↑
Thyristors, Triacs, IGBT	Onsemi	12 - 20 weeks	↑	↑
	STMicroelectronics	16 - 20 weeks <i>IGBT lead times up</i>	↑	↑
Rectifiers	Diodes Inc.	20 - 28 weeks	↑	↑
	STMicroelectronics	16 - 20 weeks	↑	↔
	Toshiba	12 - 14 weeks	↑	↑
	Onsemi	14 - 20 weeks	↑	↑
	Vishay	8 - 20 weeks	↑	↑

SEMICONDUCTOR MARKET TRENDS

Logic

Future Lead Times Increasing 

Price Stable 

Logic markets remain largely balanced, with stable pricing and only selective lead time extensions in programmable devices and higher-performance FPGA families. AI demand continues to support the segment, though overall availability remains significantly healthier than memory and power-focused semiconductor markets. However, the ongoing FPGA shortage is causing some issues for many buyers.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
Programmable	AMD	18 - 52 weeks <i>Some FPGAs at 40 weeks</i>		
	Infineon	20 - 24 weeks		
	Microchip	12 - 20 weeks <i>Some FPGAs at 40 weeks</i>		
Standard	Nexperia	12 - 18 weeks <i>Export issue</i>		
	Onsemi	16 - 20 weeks <i>Some parts at 40+ weeks</i>		
Logic IC	Toshiba	18 - 20 weeks		

SEMICONDUCTOR MARKET TRENDS

Advanced Analog

Future Lead Times Increasing ↑

Price Increasing ↑

Advanced analog markets are seeing increasing demand from AI infrastructure and power management applications, mostly associated with data center build outs. Lead times are expanding across select interface, power regulation, and signal conditioning products, while suppliers continue to implement targeted price increases on higher-performance analog device families.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
Dataconverters	Microchip	6 - 8 weeks	↔	↔
	Renesas	20 - 22 weeks	↑	↑
	STMicroelectronics	12 - 30 weeks	↑	↑
OPA	Microchip	6 - 8 weeks	↔	↔
	MPS	20 - 32 weeks	↑	↑
	NXP	16 - 26 weeks	↔	↑
	Onsemi	6 - 16 weeks	↑	↑
	STMicroelectronics	12 - 20 weeks	↑	↑
Interfaces: LVDS, UART USB	Microchip	6 - 8 weeks	↔	↔
	MPS	20 - 40 weeks	↑	↑
	NXP	10 - 26 weeks	↔	↑
	Renesas	18 - 22 weeks	↑	↑
	STMicroelectronics	10 - 30 weeks	↑	↑



ADVANCED ANALOG TRENDS

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
Power Management: Low Drop, PWM, Switching Regulators	Infineon	18 - 20 weeks	↑	↑
	Microchip	6 - 8 weeks	↔	↔
	MPS	20 - 40 weeks	↑	↑
	Onsemi	12 - 20 weeks	↑	↑
	STMicroelectronics	12 - 20 weeks	↑	↑
Analog	Toshiba	12 - 16 weeks	↑	↑

SEMICONDUCTOR MARKET TRENDS

Embedded Processing

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

Future Lead Times Increasing 

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

Price Stable 

Embedded processing demand continues to be supported by edge AI and connected device deployments. While lead times are extending across select MCU and 32-bit product families, supply remains broadly available and pricing is expected to remain stable.

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 - 26 weeks		
	STMicroelectronics	32 weeks		
16-bit	Infineon	18 - 24 weeks		
	Microchip	12 - 20 weeks		
	NXP	16 - 22 weeks		
	STMicroelectronics	32 weeks		
32-bit	Infineon Allocation	18 - 24 weeks		
	Microchip	8 - 16 weeks		
	NXP	16 - 42 weeks		
	STMicroelectronics	32 weeks		
MCU	Renesas	26 weeks		



SEMICONDUCTOR MARKET TRENDS

Optoelectronics

Future Lead Times Stable ↔

Price Stable ↔

Optoelectronics markets remain stable as supply continues to keep pace with demand. Lead times and prices are expected to remain largely unchanged through Q3.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
High Power: IR, Visible, Laser, LED	amsOSRAM	20 - 24 weeks	↔	↔
	Broadcom	13 - 24 weeks	↔	↔
Low Power: IR, Visible, Laser, LED	amsOSRAM	20 - 24 weeks	↔	↔
	Broadcom	13 - 25 weeks	↔	↔

SEMICONDUCTOR MARKET TRENDS

Sensors

Future Lead Times Stable ↔

Price Stable ↔

The sensor market will remain broadly stable. Supply conditions remain balanced across most product categories. However, there will be some isolated lead time growth in higher-performance sensing applications and specialized device families associated with AI.

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 <i>SKH-400 at 40 weeks</i>	↔	↔
	Vishay	6 - 22 weeks	↔	↔

SENSOR TRENDS

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
Image	amsOSRAM	26 - 30 weeks	↔	↔
	Amphenol	2 - 6 weeks	↓	↔
T & H	amsOSRAM	8 - 23 weeks	↔	↔
	STMicroelectronics	16 - 20 weeks	↑	↔
	TE Connectivity	8 - 20 weeks	↔	↔
	NXP	16 - 52 weeks	↔	↔
Sensors	Onsemi	16 - 18 weeks <i>DPBR1 + DRI at 66 weeks</i>	↔	↔
	Vishay	6 - 22 weeks <i>Vishay light sensors</i>	↔	↔
	STMicroelectronics	16 - 18 weeks	↑	↔
Accelerometers	TE Connectivity	15 - 20 weeks	↔	↔
	TDK	16 - 18 weeks	↑	↑
ALS	amsOSRAM	2 - 16 weeks	↔	↔
	Broadcom	26 - 36 weeks	↔	↑
Slotted Interrupters, MEMS	Vishay	6 - 10 weeks	↔	↔

PEMCO MARKET TRENDS

Passives

Future Lead Times Increasing ↑

Price Increasing ↑

Lead times continue to grow, exceeding the published range. Most polymer capacitor lead times remain highly elevated due to AI demand, with high-performance MLCCs booked out by AL and automotive applications. Many select part numbers are on allocation, so check with your supplier to ensure yours are not on that list. Aerospace and defense products continue to experience lead time extensions, with capacity booked through 2027.

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 - 14 weeks <i>Thin Film 8 - 12 weeks</i>	↔	↔
Resistors Networks and Arrays	Bourns	8 - 15 weeks	↔	↔
	Panasonic	18 - 26 weeks	↔	↔
	Vishay	10 - 24 weeks	↔	↔
Resistors Trimmers and Wirewound	Panasonic	14 - 20 weeks	↔	↔
	Vishay	12 - 28 weeks	↑	↑
Capacitors Aluminium	Kemet / Yageo	22 - 34 weeks	↑	↔
	Panasonic	26 - 42 weeks	↑	↑
	TDK	22 - 36 weeks	↑	↑
Inductors	Bourns	12 - 20 weeks	↑	↑
	Kemet / Yageo	16 - 26 weeks	↔	↔
	Kyocera AVX	16 - 20 weeks	↔	↔
	Murata	10 - 14 weeks	↔	↑
	Samsung	20 - 26 weeks	↔	↔
	Taiyo Yuden	8 - 14 weeks	↔	↔
	TDK	20 - 25 weeks	↔	↔
	Vishay	10 - 20 weeks	↔	↑

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) <i>MLCC high CV lead times extending on multiple suppliers</i>	Kemet / Yageo	20 - 30 weeks	↑	↔
	Kyocera AVX	14 - 30 weeks	↑	↑
	Murata	10 - 20 weeks	↑	↑
	Samsung	20 - 26 weeks	↑	↑
	Taiyo Yuden	16 - 24 weeks	↑	↑
	TDK	16 - 28 weeks	↑	↑
	Vishay	12 - 32 weeks	↑	↑
Capacitors Tantalum Standard and Low ESR	Kemet / Yageo	16 - 20 weeks	↑	↑
	Kyocera AVX	13 - 16 weeks	↑	↑
	Vishay	26 - 30 weeks	↑	↑
Capacitors Tantalum Polymer	Kemet / Yageo	22 - 49 weeks	↑	↑
	Kyocera AVX	18 - 32 weeks	↑	↑
	Vishay	30 - 50 weeks	↑	↑
Military Ceramics: M123, M49470, leaded	Kemet / Yageo	26 - 32 weeks	↑	↑
	Kyocera AVX	20 - 36 weeks	↑	↑
	Vishay	26 - 44 weeks	↑	↑
Military Tantalums: M39003, M9006, CWR	Kemet / Yageo	18 - 28 weeks	↑	↑
	Kyocera AVX	16 - 28 weeks	↑	↑
	Vishay	12 - 24 weeks	↑	↑
Military Resistors: M55342	Vishay	10 - 20 weeks	↑	↑

PEMCO MARKET TRENDS

Interconnect

Future Lead Times Stable ↔

Price Increasing ↑

Growing demand from AI infrastructure, data centers, and high-performance computing platforms is increasing consumption of power and high-speed connectivity solutions, with material and manufacturing costs supporting higher pricing trends. Metal inflation has been the primary driver of price adjustments in the last quarter, with probable price increases expected for 2H26.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
Backplane	Amphenol	10 - 14 weeks	↔	↑
	ITT	16 - 32 weeks	↑	↑
	Molex	15 - 19 weeks	↔	↑
	TE Connectivity	10 - 16 weeks	↔	↑
Circular	Amphenol	12 - 20 weeks	↑	↑
	Conesys	10 - 20 weeks	↔	↑
	Glenair	3 - 6 weeks	↔	↔
	ITT	16 - 32 weeks	↑	↑
	ODU	8 - 14 weeks	↔	↑
	TE Connectivity	15 - 22 weeks	↔	↑
D-Shaped	Amphenol	9 - 14 weeks	↑	↑
	Glenair	3 - 6 weeks	↔	↔
	ITT	16 - 32 weeks	↑	↑
	TE Connectivity	10 - 20 weeks	↔	↔
I/O	Amphenol	8 - 16 weeks	↑	↑
	Molex	12 - 16 weeks	↔	↑
	TE Connectivity	10 - 14 weeks	↔	↑

INTERCONNECT PEMCO TRENDS

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE
		CURRENT	FUTURE TREND NEXT 3 MONTHS	FUTURE TREND NEXT 3 MONTHS
Power	Amphenol	8 - 16 weeks	↑	↑
	Molex	12 - 18 weeks	↔	↑
	Samtec	1 - 6 weeks	↔	↑
	TE Connectivity	12 - 16 weeks	↔	↑
Terminal Block	Amphenol	8 - 16 weeks	↑	↑
	Molex	10 - 16 weeks	↔	↑
	TE Connectivity	12 - 16 weeks	↔	↑
Discrete Housing	Amphenol	10 - 16 weeks	↔	↑
	Molex	9 - 15 weeks	↔	↑
	Samtec	4 - 8 weeks	↔	↑
	TE Connectivity	12 - 18 weeks	↔	↑
PC Board	Amphenol	8 - 16 weeks	↑	↑
	ITT	16 - 20 weeks	↑	↑
	Molex	12 - 17 weeks	↔	↑
	Samtec	1 - 6 weeks	↑	↑
	TE Connectivity	12 - 20 weeks	↔	↑
Cable Assemblies	Amphenol	10 - 14 weeks	↔	↑
	Glenair	3 - 6 weeks	↔	↔
	ITT	16 - 32 weeks	↑	↑
	Molex	15 - 20 weeks	↔	↑
	Samtec	3 - 10 weeks	↔	↑
	TE Connectivity	15 - 21 weeks	↔	↑

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	16 - 32 weeks <i>Copper lead times up</i>	↑	↑
	Molex	10 - 15 weeks	↔	↑
	ODU	8 - 12 weeks	↔	↑
	TE Connectivity	12 - 18 weeks	↔	↑
Connector Contacts	Amphenol	12 - 18 weeks	↑	↑
	ITT	16 - 32 weeks	↑	↑
	Molex	10 - 14 weeks	↔	↑
	TE Connectivity	12 - 20 weeks	↔	↑

PEMCO MARKET TRENDS

Electro-Mechanical

Future Lead Times Increasing ↑

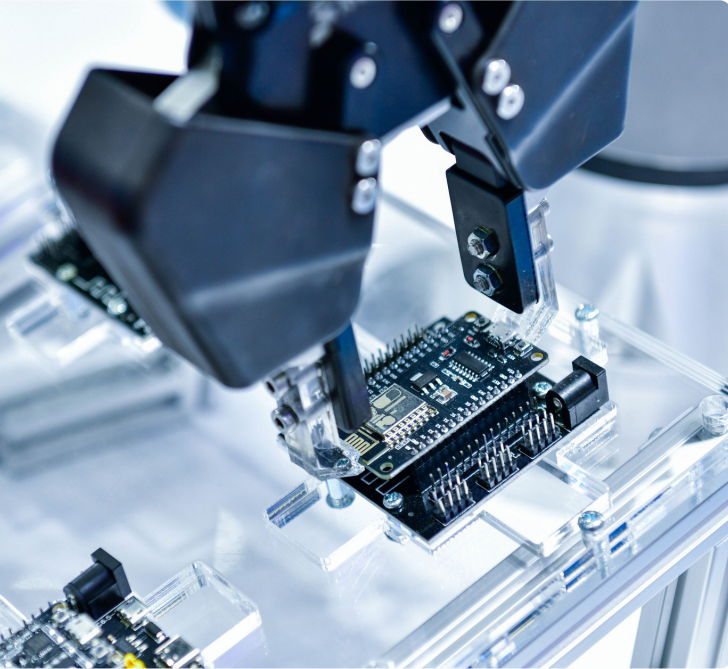
Price Increasing ↑

Electromechanical markets continue to tighten as AI infrastructure investments drive demand for power, thermal management, and control components. Lead times and pricing are trending upward as suppliers respond to increasing demand and higher manufacturing costs. Particularly, raw material inflation, specifically for metals, has been one of the main contributing factors for price adjustments by suppliers.

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	10 - 16 weeks <i>MEMS at 26 weeks</i>	↑	↑
	ECS	10 - 16 weeks <i>MEMS at 30 weeks</i>	↑	↑
Switch Relays	OMRON	6 - 25 weeks	↑	↑
Power: AC/DC, DC/DC	ABB	28 weeks	↑	↑
	Artesyn	28 weeks	↑	↑
	Bel	28 weeks	↑	↑
	MEAN WELL	28 weeks	↑	↑
	Murata	28 weeks	↑	↑
	TDK	28 weeks	↑	↑
	Lambda	28 weeks	↑	↑

Final Thoughts

AI continues to drive demand volatility



Lead times will stay tight as prices fluctuate

Most market categories continue to benefit from balanced supply conditions with healthier demand levels than those seen during the most recent glut. For many buyers, availability remains predictable and procurement conditions are significantly more manageable.

However, the influence of AI continues to expand across the component ecosystem. This demand has pushed many popular parts into allocation-only models, where larger organizations specializing in AI or hyperscale solutions get preferential contracts. As a result,

these segments will continue to experience the greatest risk to unavailability, as most production capacity has been booked through 2028.

Continued demand for HBM, enterprise SSDs, and high-performance DRAM products is expected to keep capacity utilization high. Outside of memory, passive components, interconnect products, and electromechanical solutions supporting AI infrastructure will see increased tightening. While widespread shortages are not anticipated, buyers should expect localized constraints in higher-performance product categories where AI demand overlaps.

Agility remains the most effective procurement strategy. Organizations that maintain supply chain visibility, diversify sourcing options, and proactively manage demand forecasts will be best positioned to navigate this complex market. AI-driven demand is expected to remain the primary market driver for most growth patterns through 2026.

However, staying atop of ongoing geopolitics is essential, as recent raw material price trends cite increased A&D consumption alongside trade challenges as why increases have occurred.

Want deeper insights driving these shifts?

Learn more about the factors behind these changes.

Ready to plan your next move?

Your Sourceability account manager is here to support you with secure sourcing strategies and insights on part alternatives to keep your production line running smoothly.

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