MARKET UPDATE

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FOCUSED INDUSTRIES

AEROSPACE & DEFENSE

Component Demand Fluctuations: Discrete components such as Vishay's MOSFETs, which are essential for power management in a wide array of defense applications, show a notable trend toward stable pricing, indicative of mature procurement strategies in place.

Lead Time Analysis: Extended lead times, especially for Vishay and Infineon parts, are a direct consequence of heightened global defense and aerospace activities.

DISCRETE: MOSFETS, RECTIFIERS, TVS DIODES, IGBT

Manufacturer	Product	Pricing	Lead Time
Vishay	MOSFETs	Stable	20-52 weeks or more
Infineon	MOSFETs	Stable	18-40 weeks or more

MEMORY: DRAM, FLASH MEMORIES

Manufacturer	Product	Pricing	Lead Time
Micron	Flash Memories	Stable	12-20 weeks or more
	DRAM		12-22 weeks or more

AUTOMOTIVE

MCU & MPU Trends: The Microchip Atmega & PIC16F series are in high demand, reflecting a shift towards more advanced automotive technologies. The PIC18F and AT32U series also show significant market traction.

Supply Chain Insights: Long lead times, particularly for the PIC and ATMEGA series, point to supply chain pressures under increasing electronic complexity in vehicles.

MICROCONTROLLERS (MCU) / MICROPROCESSORS (MPU)

Manufacturer	Product	Pricing	Lead Time
Microchip	MCU, 8-bit	Stable	26-52 weeks or more
	MCU, 16-bit		18-52 weeks or more
	MCU, 32-bit		35-52 weeks or more

POWER MANAGEMENT: DC/DC SWITCHING REGULATORS, LINEAR VOLTAGE REGULATORS, DC/DC CONVERTERS

Manufacturer	Product	Pricing	Lead Time
Texas Instruments	DC/DC Switching Regulators	Stable/Decreasing	12-26 weeks or more

AUTOMATION SOLUTIONS

Flash Memories: Micron's flash memory pricing remains stable, but lead times range from 12 to 20 weeks or more. Notably, there's an upward trend in NAND flash prices, driven by strong market demand. Additionally, the demand for obsolete e-MMC products is on the rise, reflecting a niche market need.

Sector Outlook: The demand for advanced memory solutions, like NAND flash, and the specific interest in obsolete e-MMC products, underscores the diverse and evolving needs of the automation sector. Companies are expected to strategize around these trends, balancing innovation with supply chain agility.

MICROCONTROLLERS (MCU) / MICROPROCESSORS (MPU)

Manufacturer	Product	Pricing	Lead Time
Renesas	MCU, 8-bit	Stable	12-20 weeks or more
	MCU, 16-bit		18 weeks or more
	MCU, 32-bit		18-26 weeks or more

ANALOG: OP AMPS, ADCS, LOGIC GATES & INVERTERS

Manufacturer	Product	Pricing	Lead Time
Texas Instruments	Operational Amplifiers (OP AMPs)	Stable/Decreasing	6-26 weeks or more
	DC/DC Switching Regulators	Stable/Decreasing	12-26 weeks or more

POWER MANAGEMENT: DC/DC SWITCHING REGULATORS, LINEAR VOLTAGE REGULATORS, POWER DISTRIBUTION SWITCHES

Manufacturer	Product	Pricing	Lead Time
Texas Instruments	DC/DC Switching Regulators	Stable/Decreasing	12-26 weeks or more

MEMORY: DRAM, FLASH MEMORIES

Manufacturer	Product	Pricing	Lead Time
Micron	Flash Memories	Stable	12-20 weeks or more
Cypress	Flash Memories	Stable	14-30 weeks or more

FPGAS/CPLDS

Manufacturer	Product	Pricing	Lead Time
AMD/Xilinx	Spartan 3, XC3Sxxx series	Stable	12-16 weeks or more

INTERFACE: DRIVER, RECEIVER AND TRANSCEIVER INTERFACES

Manufacturer	Product	Pricing	Lead Time
Texas Instruments	Driver, Receiver and Transceiver Interfaces	Stable	26-35 weeks or more
Analog Devices/Maxim	Driver, Receiver and Transceiver Interfaces	Stable	20-26 weeks or more

CONSUMER DEVICES

Component Analysis: A slight increase in prices for operational amplifiers, particularly in the Analog Devices family, suggests market adjustments. The sector is bracing for a 10%-25% price hike in these components.

Market Influences: Rapid advancements in consumer electronics and renewable energy sectors are impacting the demand for these specific parts.

ANALOG: OP AMPS, ADCS, LOGIC GATES & INVERTERS

Manufacturer	Product	Pricing	Lead Time
Analog Devices	Operational Amplifiers (OP AMPs)	Increasing	7-20 weeks or more

POWER MANAGEMENT: DC/DC SWITCHING REGULATORS, LINEAR VOLTAGE REGULATORS, POWER DISTRIBUTION SWITCHES

Manufacturer	Product	Pricing	Lead Time
Texas Instruments	DC/DC Converters (Board Mount)	Stable	12-20 weeks or more

FPGAS/CPLDS

Manufacturer	Product	Pricing	Lead Time
AMD/Xilinx	Spartan 3, XC3Sxxx series	Stable	12-16 weeks or more
	Spartan 6, XC6Sxxx series		12-16 weeks or more
	Artix 7, XC7Axxx series		16 weeks or more

DISCRETE: MOSFET, RECTIFIER, TVS DIODES, IGBT

Manufacturer	Product	Pricing	Lead Time
Onsemi	MOSFETs	Stable	14-40 weeks or more
Vishay	MOSFETs	Stable	20-52 weeks or more

MICROCONTROLLERS (MCU) / MICROPROCESSORS (MPU)

Manufacturer	Product	Pricing	Lead Time
Renesas	MCU, 8-bit	Stable	12-20 weeks or more
	MCU, 16-bit		18 weeks or more
	MCU, 32-bit		18-26 weeks or more
STMicroelectronics	MCU, 32-bit	Stable	13-22 weeks or more

INTERFACE: DRIVER, RECEIVER AND TRANSCEIVER INTERFACES

Manufacturer	Product	Pricing	Lead Time
Texas Instruments	Driver, Receiver and Transceiver Interfaces	Stable	26-35 weeks or more

PASSIVE: CHIP RESISTORS, FIXED INDUCTORS, CERAMIC CAPACITORS

Manufacturer	Product	Pricing	Lead Time
Murata	Ceramic Capacitors	Stable	14-24 weeks or more

HEALTH CARE

Lead Time Observations: While the pricing is stable, Micron's DRAM is subject to lead times of 12 to 22 weeks or more, suggesting a need for strategic planning in procurement processes. High Bandwidth Memory (HBM) is experiencing even longer lead times, which indicates specific supply chain pressures in providing high-performance memory solutions.

Supply Chain Adjustments: The longer lead times for specialized memory, such as HBM, may compel device manufacturers to seek alternative suppliers or invest in buffer stocks to ensure product development and production timelines remain on track.

MICROCONTROLLERS (MCU) / MICROPROCESSORS (MPU)

Manufacturer	Product	Pricing	Lead Time
Microchip	MCU, 8-bit	Stable	26-52 weeks or more
	MCU, 16-bit		18-52 weeks or more
	MCU, 32-bit		35-52 weeks or more

MEMORY: DRAM, FLASH MEMORIES

Manufacturer	Product	Pricing	Lead Time
Micron	DRAM	Stable	12-22 weeks or more

INDUSTRIAL MACHINERY

Component Diversity: The industrial machinery sector shows a broad and stable demand across various component families. Notably, Microchip's AT32U series of microcontrollers are in high demand, underlining their importance in modern machinery.

Future Trends: As the industry leans towards integrating AI and IoT technologies, the demand for Microchip's MCUs is expected to surge, possibly impacting supply strategies and lead times further.

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	MCU, 16-bit		18-52 weeks or more
	MCU, 32-bit		35-52 weeks or more

INTERFACE: DRIVER, RECEIVER AND TRANSCEIVER INTERFACES

Manufacturer	Product	Pricing	Lead Time
Texas Instruments	Driver, Receiver and Transceiver Interfaces	Stable	26-35 weeks or more

PASSIVE: CHIP RESISTORS, FIXED INDUCTORS, CERAMIC CAPACITORS

Manufacturer	Product	Pricing	Lead Time
Vishay	Chip Resistors	Decreasing	20-46 weeks or more

MODULES

Passive Component Market: The modules sector is experiencing a steady demand for passive components such as chip resistors, fixed inductors, and ceramic capacitors. This market segment is crucial for the stability and functionality of a wide range of modules.

The Impact of the Japan Earthquake on Murata: The recent earthquake in Japan has introduced additional complications to the supply chain. Murata's operations, like many others, are susceptible to the disruptions caused by such natural disasters. Given Murata's significant role in the production of ceramic capacitors, any impact on their manufacturing capabilities can have a ripple effect across the modules sector, potentially leading to extended lead times and tightened supply.

Companies are advised to closely monitor the situation and possibly seek alternative sources or stockpile essential components to mitigate the risk of production delays. The earthquake's aftermath may also spur discussions on supply chain diversification and the importance of disaster preparedness in procurement strategies.

PASSIVE: CHIP RESISTORS, FIXED INDUCTORS, CERAMIC CAPACITORS

Manufacturer	Product	Pricing	Lead Time
Murata	Ceramic Capacitors	Stable	14-24 weeks or more

MEMORY: DRAM, FLASH MEMORIES

Manufacturer	Product	Pricing	Lead Time
Micron	SPI NOR Flash Memories	Stable	12-20 weeks or more
Macronix	SPI NOR Flash Memories	Stable	12-20 weeks or more

INTERFACE: DRIVER, RECEIVER AND TRANSCEIVER INTERFACES

Manufacturer	Product	Pricing	Lead Time
Analog Devices / Maxim	Driver, Receiver and Transceiver Interfaces	Stable	20-26 weeks or more

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