BRIOCEAN

June 2025

Monthly Market Updates

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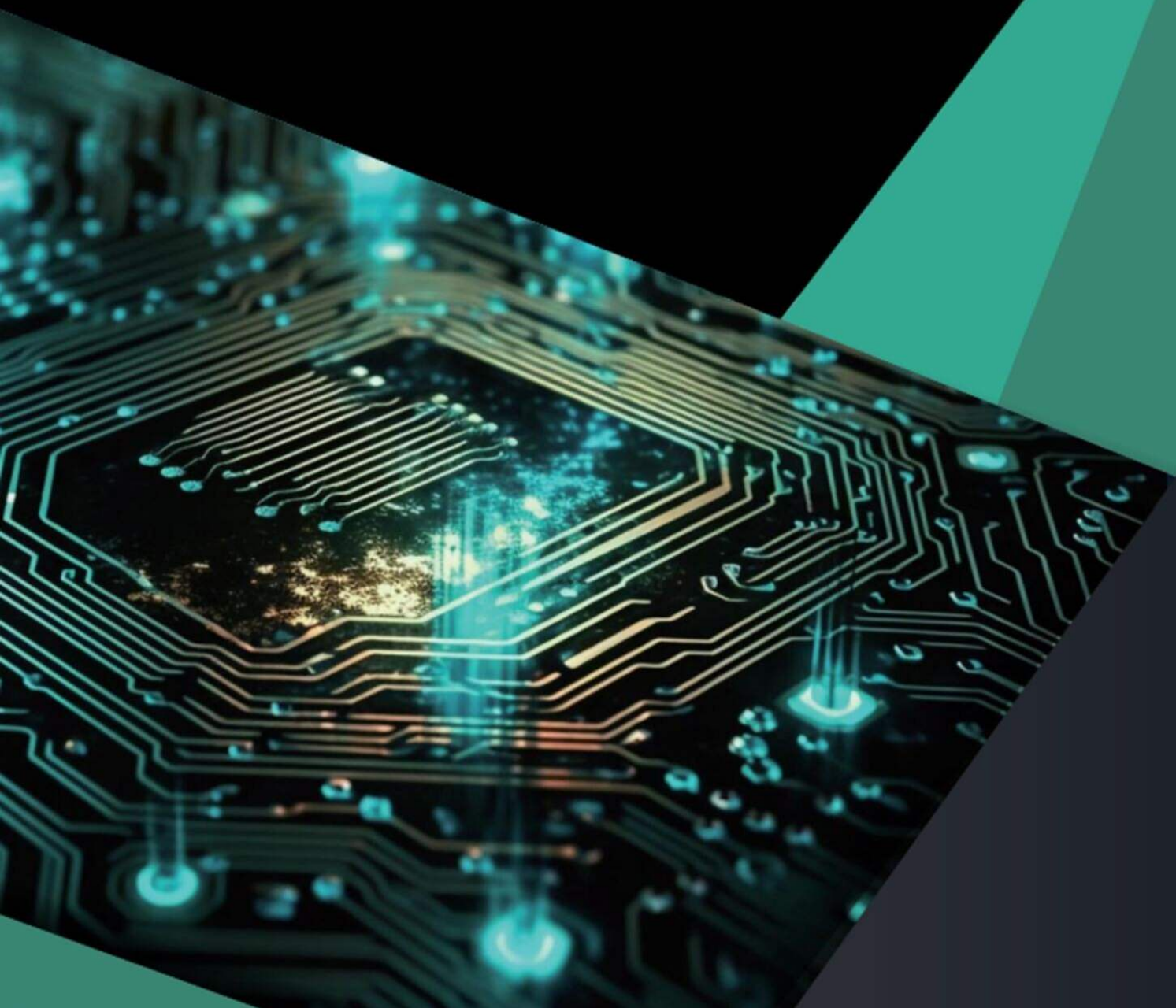

About Briocean

Briocean was established in 2008 as ISO9001:2005, and ANSI/ESD S20.20-2021 certified leading independent electronic component distributor, with our headquarters in Singapore. Our company specialises in sourcing and supply chain management services for the electronic manufacturing clients across a broad range of industries.

Our global network of over 10,000 vetted suppliers allows us to respond to the unique needs of our clients, from reducing component shortages to achieving significant cost savings. Our robust supplier management system and two state-of-the-art quality assurance centres in Shenzhen and Hong Kong ensure that we deliver reliable, traceable procurement services.

At Briocean, quality is our cornerstone. Our commitment is to ensure that every component we source is of the highest quality.

Summary

Category	Trend
Macroeconomics	- WSTS Forecast: Global Semiconductor Market to Reach $700.9 Billion in 2025, Growing by 11.2%; - EU Chips Act Progresses, But 2030 Market Share Target Remains Elusive; - Japan Bets JPY 50 Trillion on Chip Self-Sufficiency; TSMC Expansion Delays Pose Uncertainty; - New South Korean Administration Plans Increased Semiconductor Spending and AI-Driven Growth; - GlobalFoundries Commits $16 Billion to Bolster US Semiconductor Manufacturing;
Industry	- DDDR4 Discontinuation Triggers Memory Market Volatility; CXMT Accelerates Substitution Efforts; - Automotive MCU Capacity Expansion Fails to Alleviate Industrial Chip Shortages; Lead Times Still Reach 40 Weeks; - AI Supercomputing Drives CoWoS Capacity Scramble; Non-AI Chip Deliveries Delayed by 3-6 Months; - Glass Substrate Packaging Breakthrough Challenges TSMC Monopoly; HBM4 Yield Ramp-Up Under Pressure; - Joint Launch of 10W Edge AI Co-processor, Supporting 100 TOPS Computing Power; - Integration with TTTech Auto to Reconstruct Software-Defined Vehicle Ecosystem; - Arizona Fab to Mass Produce 4nm Chips, CoWoS Capacity Shifts Towards AI; - Release of Tomahawk 6 Switch, Single-Chip Bandwidth Reaching 102.4 Tbps; - Disbandment of SiC Team to Pivot Towards GaN; Acquisition of Transphorm to Integrate Technology; - 28nm Capacity Utilisation at 95% to Handle Automotive Orders; Q1 Revenue Grew 1.8% Against Trend;
End-market	- Artificial Intelligence: NVIDIA plans to build 20 AI factories in Europe, aiming to boost Europe's AI computing power tenfold within two years; Baidu launches its largest AI talent recruitment drive, expanding roles by over 60% across 23 business areas;

Category	Trend
End-market	- New Energy: CATL subsidiary and China FAW Group, among others, sign agreement in Hong Kong to advance Hong Kong's battery swap network construction; BYD officially announces European headquarters in Hungary, accelerating Chinese automakers' global expansion; - Consumer Electronics: Honor phone's overseas pre-orders exceed expectations by 2-3 times, with the 400 series seeing strong demand in Europe and Southeast Asia; Estun CooD Robotics releases second-generation humanoid robot Codroid 02, unlocking new possibilities for industrial applications; - Industrial Electronics: Hytera launches "Private Network Communication + Robot Dog" solution; - Automotive Electronics: Mercedes-Benz to establish North American headquarters in Atlanta, relocating 500 positions and investing in R&D facilities; - Communication Electronics: ZTE and Guangxi Big Data Development Bureau sign strategic cooperation agreement; - Medical Electronics: Siemens Healthineers plans to acquire Sirtex Medical to expand in targeted cancer therapy.
Component Pricing & Product Insights	- Memory Chips: NAND flash capacity contracts by over 30%; DDR4 memory sees a hoarding surge due to discontinuation notices; - GPU: NVIDIA holds 92% market share in the AIB (Add-in Board) market, while Intel's market share falls to 0%; - MCU: The automotive MCU market size is considerable, with accelerated domestic substitution.

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Macro Environment Overview

1. Macro Environment Overview

1.1 Industry Policy

1.1.1 WSTS Forecast: Global Semiconductor Market to Reach $700.9 Billion in 2025, Growing by 11.2%

The global semiconductor market is experiencing a significant expansion, reflecting a strong recovery and sustained growth trajectory. According to the WSTS Spring 2025 Semiconductor Market Forecast, published on June 3, 2025, the market is projected to expand by a substantial 11.2% in 2025, reaching a total value of $700.9 billion. This builds on a strong rebound observed in 2024. The forecast further anticipates continued robust growth into 2026, with an additional 8.5% expansion, pushing the total market value to an estimated $760.7 billion. This sustained growth is predominantly fuelled by the Logic and Memory segments, driven by escalating demand from Artificial Intelligence (AI), expanding cloud infrastructure, and advanced consumer electronics. Regionally, the Americas and Asia Pacific are poised to lead this growth, with anticipated increases of 18.0% and 9.8% respectively in 2025.

Spring 2025	Amounts in US$M			Year on Year Growth in %		
	2024	2025	2026	2024	2025	2026
Americas	195,123	**230,256**	**252,472**	45.2	18.0	9.6
Europe	51,250	**52,969**	**56,201**	-8.1	3.4	6.1
Japan	46,739	**47,037**	**49,776**	0.0	0.6	5.8
Asia Pacific	337,437	**370,613**	**402,252**	16.4	9.8	8.5
Total World - $M	630,549	**700,874**	**760,700**	19.7	11.2	8.5
Discrete Semiconductors	31,026	**30,219**	**32,733**	-12.7	-2.6	8.3
Optoelectronics	41,095	**39,290**	**39,956**	-4.8	-4.4	1.7
Sensors	18,923	**19,782**	**20,622**	-4.1	4.5	4.2
Integrated Circuits	539,505	**611,582**	**667,390**	25.9	13.4	9.1
Analog	79,588	81,642	85,535	-2.0	2.6	4.8
Micro	78,633	77,840	80,186	3.0	-1.0	3.0
Logic	215,768	267,259	286,842	20.8	23.9	7.3
Memory	165,516	184,841	214,826	79.3	11.7	16.2
Total Products - $M	630,549	**700,874**	**760,700**	19.7	11.2	8.5

Source: World Semiconductor Trade Statistics

1.1.2 EU Chips Act Progresses, Yet 2030 Market Share Target Remains Elusive

The European Union has made significant strides in implementing its EU Chips Act, allocating over 85% of the "Chips for Europe Initiative" budget to pilot lines and establishing competence centres across member states. This has successfully catalysed over EUR 80 billion in manufacturing investments, with seven "first-of-a-kind" State aid decisions approved. Despite this progress, an evaluation by the European Court of Auditors indicates that the EU is "far off the pace" to achieve its ambitious 2030 target of 20% global semiconductor market share, projecting only 11.7%. This assessment is prompting discussions for a "Chips Act 2.0" to refine the strategy, potentially focusing on new opportunities in AI chip design, energy-efficient architectures, photonics, and quantum semiconductors, while also addressing concerns about equitable development across member states. This ambition contrasts with the WSTS forecast for Europe, which anticipates moderate growth in 2025, underscoring the challenge Europe faces in significantly increasing its global market share amidst more robust expansion in other regions.

1.1.3 Japan Bets JPY 50 Trillion on Chip Self-Sufficiency; TSMC Expansion Delays Pose Uncertainty

Japan is aggressively pursuing its "Economic Security Moment" strategy, aiming to inject up to JPY 50 trillion in public-private investment over the next decade to bolster its domestic microchip production. Key to this is government funding for next-generation chip and quantum computing research, and support for domestic advanced chip production via Rapidus, which targets mass production of cutting-edge chips by 2027. However, Japan Times reported that TSMC, a crucial partner, signalled potential delays in its second factory expansion in Kumamoto Prefecture, presenting a challenge to Japan's ambitious timeline.

1.1.4 New South Korean Administration Plans Increased Semiconductor Spending and AI-Driven Growth

South Korea is preparing for a new industrial strategy under the incoming administration of President Lee Jae-myung, who won the June 3, 2025, presidential election. This new approach is expected to involve increased public spending on semiconductors, clean energy, and digital infrastructure to reinforce South Korea's position as an AI leader and deepen global partnerships in data regulation, defence, and R&D. The industry is currently benefiting immensely from robust global demand for high-bandwidth memory (HBM) driven by AI, leading to strong performance from companies like SK Hynix. To maintain competitiveness against rising global rivals, South Korean firms are being urged to rapidly develop new technologies and pivot production towards next-generation products. President Lee Jae-myung also highlighted global energy security and AI cooperation at the G7 Summit on June 17, leveraging Korea's technological strengths. This strategic focus aligns directly with the WSTS forecast, which explicitly highlights Memory as a leading growth segment for both 2025 and 2026, driven particularly by HBM for AI applications.

1.1.5 GlobalFoundries Commits $16 Billion to Bolster US Semiconductor Manufacturing

In a significant boost to US domestic semiconductor production, GlobalFoundries announced on June 4, 2025, plans to invest USD 16 billion to expand its semiconductor manufacturing capabilities. This investment, supported by the Trump Administration and key technology companies like Apple and SpaceX aiming to onshore critical supply chain components, is a strategic response to the "explosive growth" in artificial intelligence. The funds will be directed towards expanding facilities in New York and Vermont, as well as research and development initiatives focusing on packaging innovation, silicon photonics, and next-generation Gallium Nitride (GaN) technologies. The move is designed to strengthen US semiconductor leadership and accelerate innovation in AI, aerospace, automotive, and high-performance communications. This substantial investment mirrors WSTS forecast for the Americas, which projects a leading growth rate of 18.0% in 2025, directly supporting the increased manufacturing capacity required to meet the surging demand for AI-driven technologies and high-performance computing.

1.2 Economic Indicators

1.2.1 May 2025 Global Manufacturing PMI Analysis: Global Manufacturing Softness Persists Amidst Divergent Regional Trends; Semiconductor Demand Buoyed by AI & Sustained Memory Price Increases

The latest Manufacturing Purchasing Managers' Index (PMI) data for May 2025 provides critical insights into the global economic landscape impacting the semiconductor industry. The Global Manufacturing PMI registered 49.6, marking a second consecutive month of slight contraction in worldwide manufacturing activity. This broad softening suggests a cautious environment for overall end-product demand, which could moderate order growth for general-purpose semiconductor components. Furthermore, the persistent disruption from tariffs continues to contribute to uncertainty in global economic recovery, impacting various sectors including manufacturing. This aligns with broader macroeconomic outlooks, as the OECD recently lowered its 2025 world economic growth forecast, and the United Nations predicts a slowdown in global economic growth for the year.

Regional PMIs reveal a mixed outlook. Major Asian manufacturing hubs, including China (49.5), Japan (49.4), and South Korea (47.7), all remained below the 50-point threshold, signalling persistent and, in some cases, deepening contractions in their manufacturing sectors. This indicates subdued domestic demand for semiconductors from their respective consumer electronics, automotive, and industrial segments. Conversely, India's PMI remained robust at 57.6, underscoring strong and continued expansion, pointing to growing domestic demand for electronic devices and potential for future semiconductor ecosystem investments. In developed markets, the Americas' PMI stood at 48.5, indicating ongoing contraction, while the Eurozone PMI improved to 49.5, suggesting an easing of its manufacturing downturn and potential for stabilizing demand.

Despite these mixed and often contracting broad manufacturing signals, the semiconductor industry is experiencing distinct dynamics. According to TrendForce, an ongoing upward trend in prices for DDR3 and DDR4 DRAM was reported in the period leading up to and including May 2025. This trend suggests that strong, often AI-driven, demand for specific high-performance memory chips is consuming significant global production capacity. This allocation naturally tightens the supply of conventional DRAM, driving prices upward, even amidst broader manufacturing softness.

These PMI trends underscore that while the general global manufacturing landscape faces headwinds, the semiconductor market's performance is increasingly influenced by robust demand in niche, high-growth segments and specific supply constraints for critical components.

Global Manufacturing Purchasing Managers' Index (PMI)

Period	Global	China	Japan	Korea	India	Americas	Eurozone
2023-11	49.30	49.40	48.30	50.00	56.00	46.70	44.20
2023-12	49.00	49.00	47.90	49.90	54.90	47.40	44.40
2024-01	50.00	49.20	48.00	51.20	56.50	49.10	46.60
2024-02	50.30	49.10	47.20	50.70	56.90	47.80	46.50
2024-03	50.60	50.80	48.20	49.80	59.10	50.30	46.10
2024-04	50.30	50.40	49.60	49.40	58.80	49.20	45.70
2024-05	50.90	49.50	50.40	51.60	57.50	48.70	47.30
2024-06	49.50	49.50	50.00	52.00	58.30	51.70	45.60
2024-07	49.80	49.40	49.10	51.40	58.10	46.80	45.80
2024-08	48.90	49.10	49.80	51.90	57.50	47.20	45.60
2024-09	48.80	49.80	49.70	48.30	56.50	47.20	45.00
2024-10	48.80	50.10	49.80	48.30	57.50	46.50	46.00
2024-11	50.00	50.30	49.00	50.60	56.50	48.40	45.20
2024-12	49.60	50.10	49.60	49.00	56.40	49.20	45.10
2025-1	50.10	49.10	48.70	50.30	57.70	50.90	46.60
2025-2	50.60	50.20	49.00	49.90	56.30	50.30	47.60
2025-3	50.30	50.50	48.40	49.10	58.10	49.00	48.60
2025-4	49.80	49.00	48.70	47.50	58.20	48.70	49.00
2025-5	49.60	49.50	49.40	47.70	57.60	48.50	49.50

Source : Wind

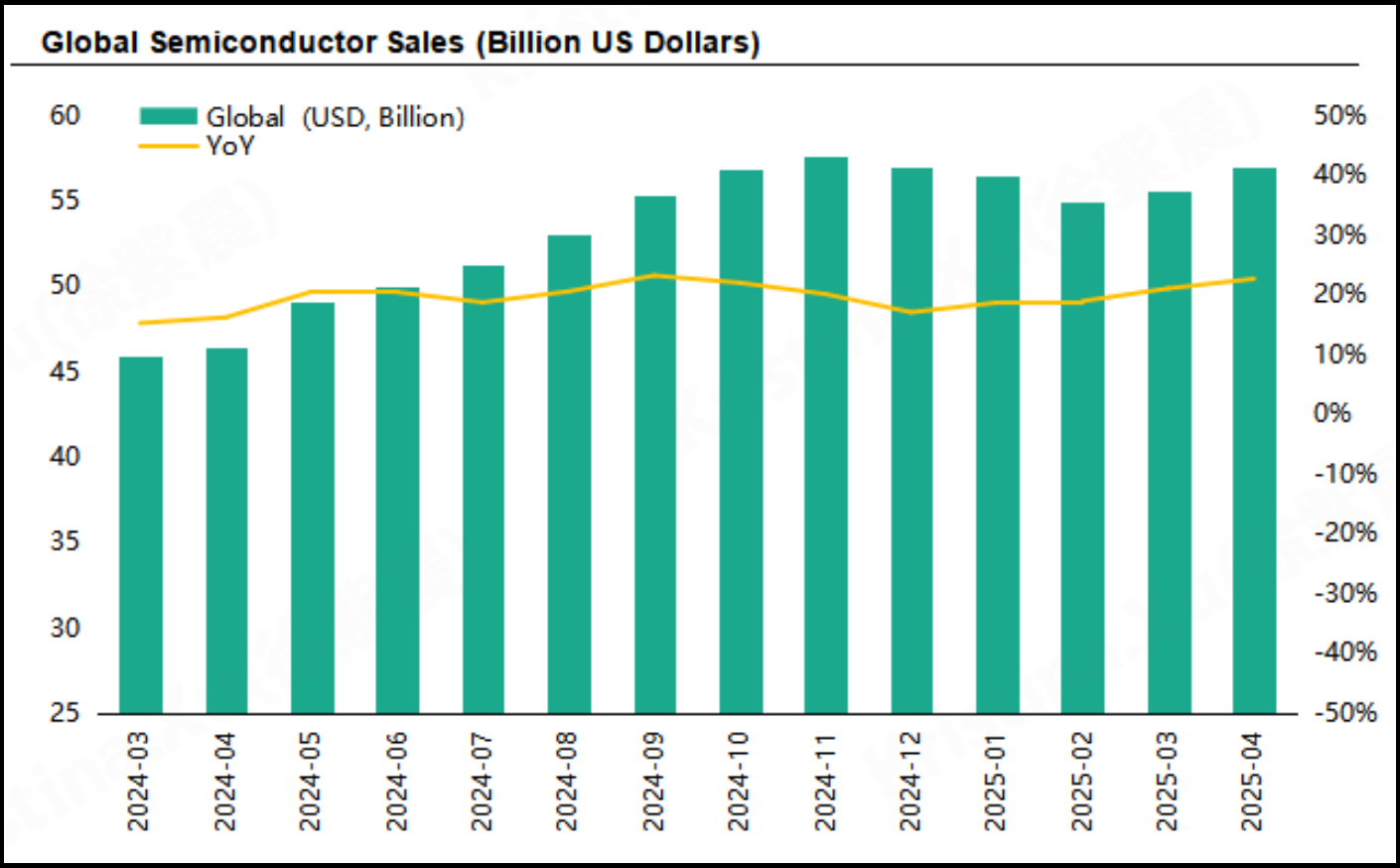
1.2.2 Global Semiconductor Market Sustains Growth Trajectory, Global Semiconductor Sales Increase 2.5% Month-to-Month in April

The Semiconductor Industry Association (SIA) announced that global semiconductor sales reached USD 57.0 billion in April 2025, marking a notable 2.5% increase from the $55.6 billion recorded in March 2025. This monthly uptick represents the first such gain in 2025 and builds upon a significant 22.7% year-over-year increase compared to April 2024's USD 46.4 billion.

John Neuffer, SIA president and CEO, commented on the market's performance, noting that "Global semiconductor sales in April ticked up on a month-to-month basis for the first time in 2025, and the global market continues to notch year-to-year growth driven by increasing sales into the Americas and Asia Pacific."

Analysing regional performance, year-over-year sales in April demonstrated significant growth across key markets: the Americas led with a 44.4% increase, followed by Asia Pacific/All Other at 23.1%, China at 14.4%, Japan at 4.3%, and Europe with a 0.1% rise. On a month-to-month basis, April sales saw increases in China (5.5%), Asia Pacific/All Other (5.3%), and Europe (0.5%). Conversely, Japan experienced a slight decrease of 0.6%, and the Americas saw a 1.1% dip compared to March.

The WSTS Spring 2025 global semiconductor sales forecast projects annual global sales will grow by a robust 11.2% in 2025, reaching USD 700.9 billion. Looking further ahead, global sales are projected to climb to USD 760.7 billion in 2026.

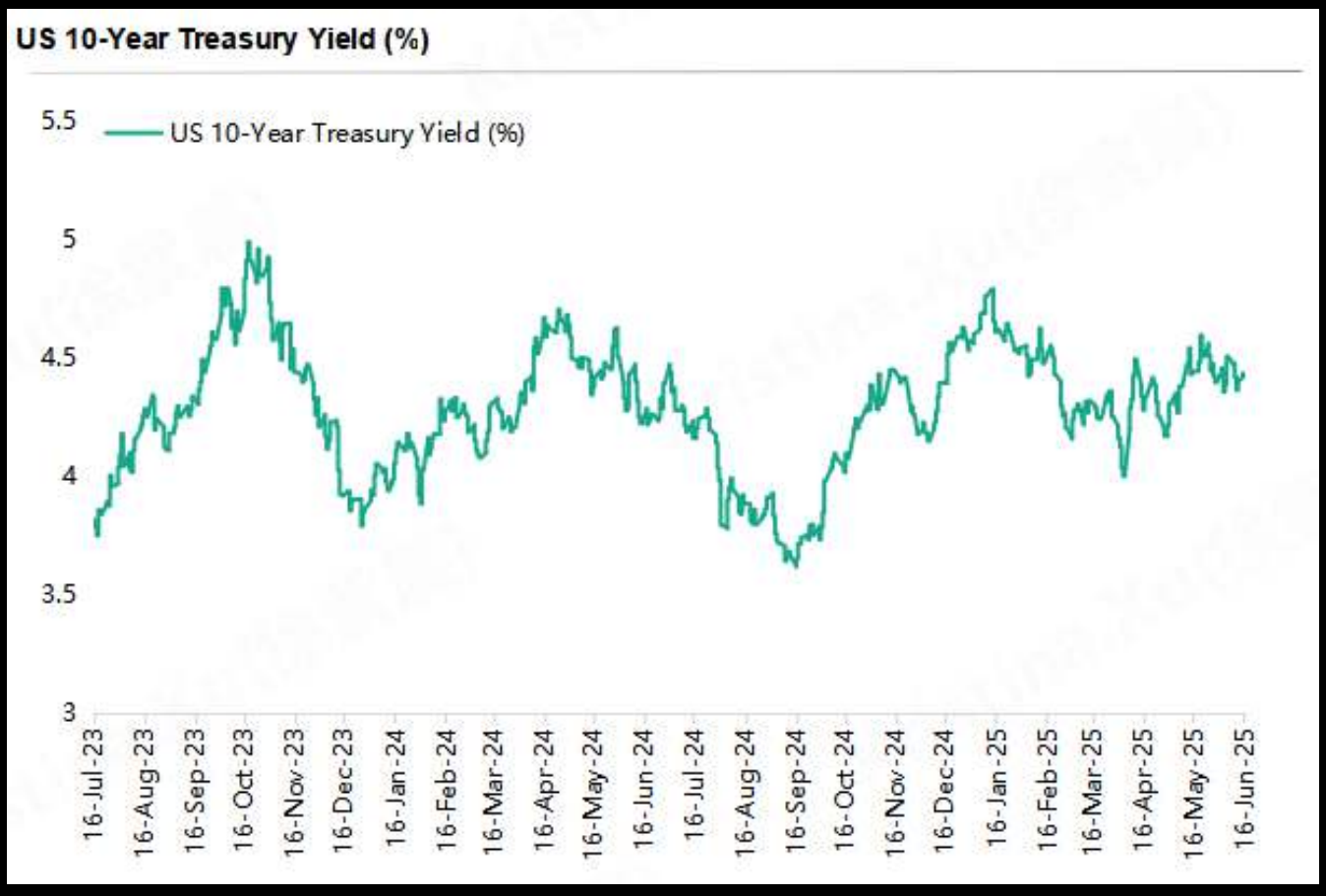


Source：SIA

1.2.3 US 10-Year Treasury Yield Trends Downward in June Amidst Evolving Rate Cut Expectations

The U.S. 10-Year Treasury Bond yield in June 2025 has demonstrated a clear downward trend, moving from approximately 4.4% - 4.5% at the beginning of the month to around 4.3% by mid-June. This decline follows a May 2025 period where the yield hovered around 4.481%. This June dip suggests renewed market expectations for potential Federal Reserve interest rate cuts, likely influenced by fresh economic data that may indicate cooling inflation or a slight moderation in economic growth. Such a reduction in yields often reflects investors seeking the relative safety of government bonds, possibly due to global economic uncertainties or a recalibration of hawkish monetary policy expectations.

For the semiconductor industry, this downward movement in the 10-Year Treasury Yield offers a more favourable financial landscape compared to earlier periods of rising rates. Lower yields generally translate to reduced borrowing costs for companies, making large-scale capital expenditures—such as investments in new fabrication plants and advanced research and development—more economically attractive. This environment could provide tailwinds for long-term strategic investments crucial for capacity expansion and technological leadership. While geopolitical tensions and tariff uncertainties, as highlighted in May, continue to be factors to monitor, a sustained trend of lower borrowing costs can significantly bolster the financial resilience and growth potential of semiconductor firms, influencing investment decisions and overall market sentiment positively.



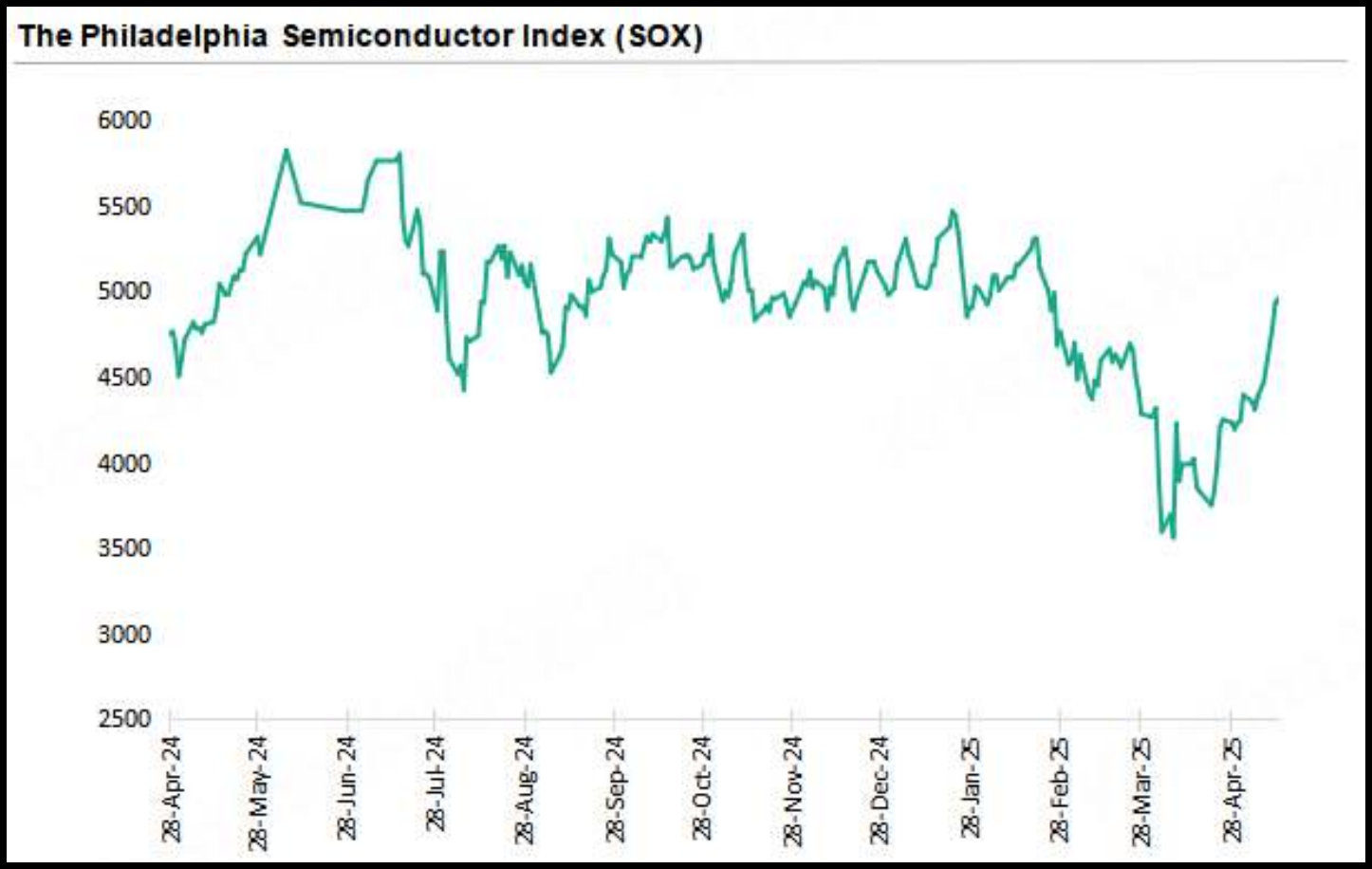
Source : Investing

1.2.4 Philadelphia Fed Survey: Robust Growth, Signalling Strong Investor Confidence in May and June

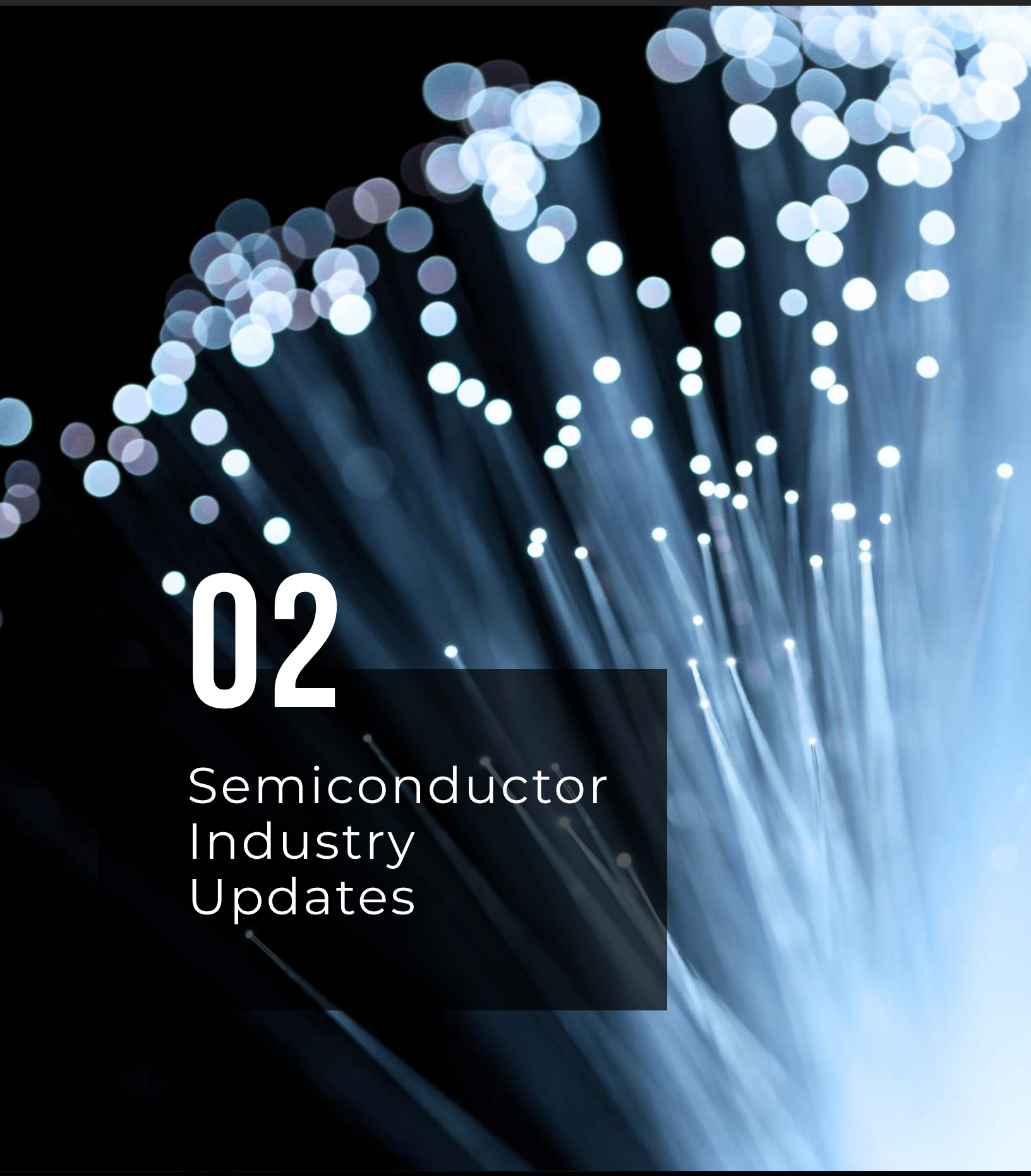
The Philadelphia Semiconductor Index (SOX) has demonstrated exceptional strength and sustained investor confidence through May and, more significantly, into mid-June 2025. This robust performance underscores the market's bullish sentiment towards the semiconductor industry, driven by strong underlying demand, particularly from high-performance computing and Artificial Intelligence (AI) sectors.

May 2025 set a strong foundation for this momentum. Following an April average of approximately 3,993.90, the SOX initiated May at 4,397.05, and despite some intra-month fluctuations, it concluded the month at 4,790.06, with an average of 4,690.77. This marked a substantial 17.44% increase from April's average, indicating strong renewed interest. The resilience demonstrated in May, even amidst mixed global manufacturing indicators, highlighted the market's growing focus on the semiconductor industry's potent demand drivers.

This positive momentum vigorously continued and accelerated into June 2025. Starting the month at 4,964.41 on June 3rd, the SOX pushed decisively higher, consistently trading above 5,000. It reached a notable high of 5,249.15 by June 12th. For the period up to June 12th, the average SOX stands at 5,085.26. This average represents an impressive 8.41% increase over May's average, signalling persistent and strengthening bullish investor sentiment.



Source : MacroMicro



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Semiconductor Industry Updates

Semiconductor Industry Updates

Impact	Manufacturer	Updates	Analysis
Short-term	Micron	DDDR4 Discontinuation Triggers Memory Market Volatility; CXMT Accelerates Substitution Efforts	Micron's cessation of DDR4 supply has led to a 50% price surge. ChangXin Memory Technologies (CXMT), leveraging its 19nm process with an 85% yield, is poised to capture a 30% market share, thereby offering a near-term alleviation of supply chain pressures for PC and server segments.
Short-term	Infineon	Automotive MCU Capacity Expansion Fails to Alleviate Industrial Chip Shortages; Lead Times Still Reach 40 Weeks	Increased capacity at Malaysian fabs, up by 20%, is easing the automotive chip shortage. However, the supply-demand imbalance for industrial IGBTs highlights a conflict in the allocation of mature process capacity.
Short-term	NVIDIA	AI Supercomputing Drives CoWoS Capacity Scramble; Non-AI Chip Deliveries Delayed by 3-6 Months	Priority allocation of TSMC's CoWoS resources to NVIDIA's 2nm GB200 chips is creating significant capacity constraints for AMD and Intel.
Mid-term	Samsung	Glass Substrate Packaging Breakthrough Challenges TSMC Monopoly; HBM4 Yield Ramp-Up Under Pressure	Commercialisation of this technology by 2028 is expected to boost chip speeds by 40%. However, the stringent 5nm lithography precision requirements are resulting in HBM4 mass production yields of only 65%.
Mid-term	TI/ADI	Joint Launch of 10W Edge AI Co-processor, Supporting 100 TOPS Computing Power	This move aims to compete in the industrial unmanned application space, directly challenging Cambricon's MLU370-X8 (128 TOPS at 15W) with its low-latency requirements.

Impact	Manufacturer	Updates	Analysis
Mid-term	NXP	Integration with TTTech Auto to Reconstruct Software-Defined Vehicle Ecosystem	The integrated cockpit-driving solution is shortening vehicle development cycles for automakers by 40%, in direct competition with the Qualcomm-Mercedes-Benz alliance.
Long-term	TSMC	Arizona Fab to Mass Produce 4nm Chips, CoWoS Capacity Shifts Towards AI	Despite localised production in the United States, reliance on Taiwanese advanced packaging persists. This dynamic could catalyse the development of indigenous XDFOI technology in mainland China.
Long-term	Broadcom	Release of Tomahawk 6 Switch, Single-Chip Bandwidth Reaching 102.4 Tbps	The adoption of Co-Packaged Optics (CPO) interconnection is anticipated to reduce supercomputing centre power consumption by 25%, fundamentally reconfiguring AI network architectures.
Long-term	Renesas	Disbandment of SiC Team to Pivot Towards GaN; Acquisition of Transphorm to Integrate Technology	The prevailing SiC price competition has led to a 9% decline in revenue. The strategic shift to a GaN licensed production model is projected to yield a 28% reduction in costs.
Long-term	SMIC	28nm Capacity Utilisation at 95% to Handle Automotive Orders; Q1 Revenue Grew 1.8% Against Trend	SMIC's strategic advantage in mature process nodes mitigates tariff risks, and its 6% market share positions it as a challenger to Samsung.

2. Semiconductor Industry Updates

2.1 Short-term Implications

2.1.1 Micron's DDDR4 Discontinuation Triggers Memory Market Volatility; CXMT Accelerates Substitution Efforts

Micron's abrupt termination of DDR4 supply has triggered structural volatility in the memory market, leading to a nearly 50% month-over-month price surge for consumer-grade DDR4. This compelled downstream manufacturers to urgently pivot towards ChangXin Memory Technologies (CXMT), leveraging its 19nm process with an 85% yield, or to accelerate the adoption of DDR5 solutions. This incident underscores the fragility of mature node supply chains while simultaneously accelerating CXMT's domestic market share growth to over 30% in China. Notably, Micron's strategy to maintain automotive-grade DDR4 supply is fostering a bifurcated market, characterized by accelerated substitution in consumer electronics and stability in the industrial control sector. In the long run, this will compel China to expedite the construction of its independent 28nm DDR4 production lines to rebuild supply chain resilience.

2.1.2 Infineon's Automotive MCU Capacity Expansion Fails to Alleviate Industrial Chip Shortages; Lead Times Still Reach 40 Weeks

Despite a 20% increase in automotive microcontroller unit (MCU) capacity at Infineon's Malaysian facility, this has only partially mitigated the electric vehicle chip shortage. Concurrently, lead times for industrial-grade Insulated Gate Bipolar Transistors (IGBTs) persist above 40 weeks, underscoring a structural imbalance in mature process capacity allocation, where expanded automotive chip production disproportionately consumes industrial resources. The mid-term imperative is to reconfigure existing capacity allocation models. Long-term, this trend will drive Integrated Device Manufacturers (IDMs) toward regionalized manufacturing, thereby enhancing holistic supply chain risk resilience through geographical diversification.

2.1.3 NVIDIA's AI Supercomputing Demand Intensifies CoWoS Capacity Competition; Non-AI Chip Deliveries Face 3-6 Month Delays

In June 2025, NVIDIA secured exclusive access to TSMC's CoWoS advanced packaging capacity for its 2nm GB200 supercomputing project. This direct action has resulted in 3-6 month delivery delays for non-AI chips from competitors such as AMD, thereby further solidifying NVIDIA's dominant position in the AI training market. This collaboration reinforces the "US/Europe Design - Taiwan Manufacturing" technology alliance, concurrently limiting mainland China's access to advanced processes. In the long run, this dynamic may catalyse the development of China's indigenous advanced packaging technologies (e.g., XDFOI), though escalating geopolitical risks continue to exacerbate the fragmentation of the global technology ecosystem.

2.2 Mid-term Implications

2.2.1 Samsung's Glass Substrate Packaging Breakthrough Challenges TSMC's Dominance; HBM4 Yield Ramp-Up Faces Pressure

Samsung's glass substrate packaging technology is slated for commercial deployment by 2028, with projected performance enhancements of 40% in chip speed and 30% in power consumption. This initiative aims to disrupt TSMC's CoWoS monopoly. However, its HBM4 development is encountering significant yield ramp-up challenges, currently at only 65%, primarily due to the complexities of 16-layer stacking and stringent 5nm lithography precision requirements. Successful commercialization of this technological breakthrough, particularly when synergized with Samsung's investment in Rainbow Robotics to establish an "AI Chip - Humanoid Robot" closed-loop ecosystem, positions the company to secure a strategic advantage in embodied AI terminal devices.

2.2.2 TI/ADI Jointly Launch 10W Edge AI Co-processor, Supporting 100 TOPS Compute Power

Texas Instruments (TI) and Analog Devices (ADI) collaboratively introduced a 10W TDP (Thermal Design Power) edge AI co-processor capable of 100 TOPS (Tera Operations Per Second) in June 2025. By integrating multiple sensors, this solution aims to reduce industrial deployment costs by 30%. However, in the mid-term, it faces robust competition in low-latency scenarios from competitors such as Cambricon's MLU370-X8 (128 TOPS at 0.75ms latency). This necessitates achieving sub-0.8ms response times in real-world testing and addressing the 40% price advantage offered by domestic Chinese chips. Its long-term competitiveness hinges on transitioning to 3nm process nodes; otherwise, in-memory computing architectures could fundamentally alter existing power efficiency models.

2.2.3 NXP Integrates TTTech Auto to Reconstruct Software-Defined Vehicle Ecosystem

NXP's strategic integration of TTTech Auto's MotionWise middleware marks a major milestone in the evolution of software-defined vehicles (SDVs). By tightly coupling hardware and software across cockpit and driving domains, the collaboration has slashed development timelines by up to 40%—as seen in BMW's recent platform rollout, reduced from 24 to just 14 months.

Looking ahead, NXP plans to open its S32G and V2X interfaces to support a multi-vendor chip environment, aiming to cut integration costs by an estimated 30%. While this mid-term vision positions NXP as a cost-efficient enabler of modular SDV platforms, it faces long-term competitive pressure from centralized computing players—most notably, the Qualcomm–Mercedes-Benz "One Brain" alliance, which has already secured backing from 12 major OEMs.

2.3 Long-term Implications

2.3.1 TSMC's Arizona Fab Mass Produces 4nm Chips; CoWoS Capacity Shifts Towards AI Applications

TSMC has commenced mass production of 4nm chips at its Arizona fab, highlighting a persistent vulnerability in the U.S. semiconductor supply chain: advanced packaging capabilities remain concentrated in Taiwan. To address this, TSMC and Amkor plan to launch a joint packaging facility in 2026, aiming to reduce geopolitical exposure mid-term. Meanwhile, TSMC's ongoing prioritization of CoWoS capacity for AI applications is accelerating the development of domestic advanced packaging technologies in China—such as XDFOI—reshaping the competitive dynamics of the global advanced node landscape.

2.3.2 Broadcom Unveils Tomahawk 6 Switch with Record-Breaking 102.4 Tbps Bandwidth

Broadcom has launched the Tomahawk 6, the world's first switch chip to deliver 102.4 terabits per second (Tbps) of bandwidth on a single die—representing a significant advancement in data centre infrastructure. Its Co-Packaged Optics (CPO) technology enables tight optical-electrical integration, meeting the extreme interconnect requirements of hyperscale XPU clusters. For example, Meta's 300,000-card cluster latency has been reduced to just 1.2 microseconds. The switch also features a Cognitive Routing 2.0 engine that utilizes reinforcement learning to dynamically optimize data transmission paths for AI workloads. This has led to a 40% increase in distributed training efficiency, with ResNet-502 training times cut from 18 to 11 days.
Broadcom further aims to lead the development of Ultra Ethernet Consortium (UEC) standards, transitioning Ethernet from a traditional "best-effort" model to one that supports deterministic low-latency communication —positioning it as a credible challenger to InfiniBand in high-performance computing, with projected penetration exceeding 35% by 2027.

2.3.3 Renesas Disbands SiC Team to Pivot Towards GaN; Acquires Transphorm for Technology Integration

Renesas has disbanded its Silicon Carbide (SiC) division and sold off related equipment from its Takasaki factory, signalling a strategic withdrawal from the SiC market. The move comes amid intensifying price competition and the looming bankruptcy risk of key supplier Wolfspeed. With SiC substrate prices falling toward $400—close to cost levels—Renesas experienced a 9% revenue decline in Q1 2025. In response, the company is pivoting to a Gallium Nitride (GaN) strategy based on licensed production, outsourcing manufacturing to Polar Semiconductor to realize a 28% reduction in production costs. Through its acquisition of Transphorm, Renesas is integrating cutting-edge GaN technology into its portfolio, with a focus on high-growth sectors such as data centres, electric vehicles, and aerospace. The goal is to position itself as a future leader in the next wave of third-generation semiconductor competition.

2.3.4 SMIC's 28nm Capacity Utilization at 95% Driven by Automotive Orders; Q1 Revenue Reports 1.8% Counter-Cyclical Growth

SMIC reported Q1 revenue of $2.247 billion, representing a 1.8% sequential increase despite broader industry headwinds. Strong demand from the automotive sector has pushed its 28nm process utilization rate to 95%, reaffirming the importance of mature nodes in today's semiconductor landscape. To navigate uncertainties surrounding U.S. tariffs, the company has enhanced its localized inventory strategies, maintaining approximately 6% global foundry market share and gradually closing the gap with Samsung in the race for second place. However, future growth will depend heavily on SMIC's ability to overcome current barriers in advanced process technology and expand its presence in the global semiconductor value chain.

03

Application Updates

3. Application Updates Overview

Category	Section	Manufacturer	Updates
Artificial Intelligence	AI Chip	NVIDIA	NVIDIA to Establish 20+ AI Factories Across Europe, Targeting a Tenfold Increase in Regional AI Compute Power by 2026
Artificial Intelligence	Cloud Computing & Big Data	Baidu	Baidu Launches Largest AI Talent Recruitment Drive, Expands Open Roles by Over 60% Across 23 Business Units
New Energy	Photovoltaics & Energy Storage	CATL	CATL Subsidiaries, China FAW, and Partners Sign Agreement to Build Hong Kong Battery Swap Network
New Energy	New Energy Vehicles	BYD	BYD Establishes European Headquarters in Hungary as Chinese Automakers Accelerate Global Expansion
Consumer Electronics	Smartphones	HONOR	Honor 400 Series Pre-orders Exceed Expectations Globally, Driven by Strong Demand in Europe and Southeast Asia
Consumer Electronics	Robotics	Estun Codroid	Estun CooD Robotics Launches Codroid 02, Second-Generation Humanoid Robot for Industrial Use Cases
Industrial	Industrial Automation & Control	Hytera	Hytera Debuts "Private Network Communication + Robot Dog" Solution for Security, Patrol, and Rescue Operations
Automotive	Automotive Supply Chain	Mercedes-Benz	Mercedes-Benz to Establish North American Headquarters in Atlanta, Relocating 500 Roles to New R&D Facility

Category	Section	Manufacturer	Updates
Telecommunication	Communication Networks & Optical Fiber	ZTE	ZTE and Guangxi Big Data Development Bureau Sign Strategic Agreement to Drive Digital Transformation
Medical Equipment & Devices	Medical Imaging Equipment	Siemens Healthineers	Siemens Healthineers to Acquire Sirtex Medical, Enhancing Portfolio in Targeted Cancer Therapy

3.1 Artificial Intelligence

3.1.1 NVIDIA to Establish 20+ AI Factories Across Europe, Targeting a Tenfold Increase in Regional AI Compute Power by 2026

In a keynote address at GTC Paris on June 11, NVIDIA CEO Jensen Huang announced the company's strategic push to expand its AI footprint in Europe. As part of this initiative, NVIDIA will set up AI technology centres dedicated to research in seven European countries. In addition, the company plans to build over 20 large-scale AI factories throughout the continent, aimed at training and supporting advanced AI models. This ambitious effort seeks to increase Europe's AI computing power tenfold within two years, laying the groundwork for a fully integrated AI ecosystem in the region.

3.1.2 Baidu Launches Largest AI Talent Recruitment Drive, Expands Open Roles by Over 60% Across 23 Business Units

On June 14, Baidu officially launched its 2026 "AIDU Program" during the AIDU Deep Talk Open Day event—its most extensive AI talent recruitment initiative to date. This year's program has expanded job openings by more than 60% compared to 2025, covering 23 core business areas and 11 advanced research tracks. Key hiring priorities include large model algorithms, foundational infrastructure for large models, machine learning, speech technologies, and intelligent agents. The initiative reflects Baidu's intensified focus on building deep technical capabilities to support its leadership in next-generation AI innovation.

3.2 New Energy

3.2.1 CATL Subsidiaries, China FAW, and Partners Sign Agreement to Build Hong Kong Battery Swap Network

On June 13, CATL subsidiaries Times Electric Service and Times Xiaoju New Energy signed a strategic cooperation agreement in Hong Kong with China FAW Group and Longsheng New Energy. The agreement aims to accelerate the deployment of battery swap-enabled operational vehicles and initiate construction of a battery swap infrastructure network across Hong Kong. Under the collaboration, China FAW will lead vehicle development and after-sales services; Times Electric Service will manage battery asset operations and recycling; Times Xiaoju will provide digital support for station operations; and Longsheng New Energy will oversee infrastructure build-out and vehicle adoption. The partnership targets the rollout of 10 battery swap stations by the end of 2026, covering all districts across Hong Kong.

3.2.2 BYD Establishes European Headquarters in Hungary as Chinese Automakers Accelerate Global Expansion

On May 15, BYD officially launched its European headquarters in Budapest's District 11, marking a significant milestone in its regional strategy. The headquarters will oversee sales and after-sales services, vehicle certification and testing, as well as localized vehicle design and feature development for the European market. As part of a broader €500 million investment plan over the next three years, BYD will also establish a research and development centre and a regional logistics hub in Hungary, expected to generate approximately 2,000 local jobs. The move reflects the increasing momentum of Chinese EV manufacturers in expanding their global footprint.

3.3 Consumer Electronics

3.3.1 Honor 400 Series Pre-orders Exceed Expectations Globally, Driven by Strong Demand in Europe and Southeast Asia

On May 29, Honor announced that pre-orders for its new Honor 400 series smartphones have exceeded internal projections by 2 to 3 times. This strong performance is attributed to a rebound in global consumer electronics demand and the company's effective localization strategy, particularly in Europe. In Southeast Asia, the robust market response has been fuelled by favourable demographic dynamics and the rise of emerging consumer trends, reinforcing the region's growing importance in Honor's global expansion strategy.

3.3.2 Estun CooD Robotics Launches Codroid 02, Second-Generation Humanoid Robot for Industrial Use Cases

At the 2025 Intelligent Robot Development Conference on June 11, Estun CooD Robotics—a robotics subsidiary of Chinese industrial control leader Estun—unveiled its second-generation humanoid robot, Codroid 02. The robot integrates a proprietary joint module that balances force and precision, with all core components developed in-house. In demonstration videos, Codroid 02 exhibited advanced industrial capabilities including physical tasks such as object grasping and material transport, as well as detailed operations like screw fastening and quality inspection patrols. Equipped with online learning functionality, Codroid 02 can autonomously expand its skill set, supporting highly adaptable and flexible manufacturing environments.

3.4 Industrial

3.4.1 Hytera Debuts "Private Network Communication + Robot Dog" Solution for Security, Patrol, and Rescue Operations

On June 9, Hytera introduced an innovative solution that combines its proprietary broadband ad-hoc networking technology with robotic dog systems. The “Private Network Communication + Robot Dog” solution is designed for a wide range of use cases, including routine inspections, law enforcement patrols, large-scale security deployments, and emergency rescue missions. In future iterations, command personnel will be able to remotely issue real-time directives to unmanned intelligent devices such as robotic dogs and drones through dispatch terminals or walkie-talkies. As robotic dog capabilities evolve, Hytera intends to integrate AI-driven private network technologies to enhance the solution and expand related product offerings.

3.5 Automotive

3.5.1 Mercedes-Benz to Establish North American Headquarters in Atlanta, Relocating 500 Roles to New R&D Facility

On May 22, Mercedes-Benz announced plans to consolidate its North American operations by establishing a new headquarters in Atlanta. As part of this strategic move, the company will relocate up to 500 positions to its current facility in Fulton County, Georgia. Additionally, Mercedes-Benz will invest millions of dollars to develop a cutting-edge research and development centre in the Atlanta metropolitan area, supporting the work of technology teams from across the United States and reinforcing its long-term innovation roadmap.

3.6 Communication

3.6.1 ZTE and Guangxi Big Data Development Bureau Sign Strategic Agreement to Drive Digital Transformation

On June 21, ZTE signed a strategic cooperation agreement with the Guangxi Big Data Development Bureau to jointly advance regional digital transformation initiatives. The partnership will focus on several core areas, including the deployment of 5G technology applications, smart city infrastructure, and data security frameworks. This collaboration is expected to accelerate the development of the digital economy across Guangxi and strengthen the region's digital ecosystem.

3.7 Medical Equipment & Devices

3.7.1 Siemens Healthineers to Acquire Sirtex Medical, Enhancing Portfolio in Targeted Cancer Therapy

On May 29, Siemens Healthineers announced its intention to acquire Sirtex Medical, a U.S.-based medical technology firm specializing in targeted cancer therapies. Sirtex is widely recognized for its SIR-Spheres Y-90 resin microspheres, a radiotherapy treatment that has helped over 150,000 patients in more than 50 countries. The acquisition will significantly expand Siemens Healthineers' oncology portfolio, reinforcing its strategic focus on advanced cancer treatment solutions and enhancing its competitive position in the global cancer therapy market.

04

Product Updates

4. Product Updates

4.1 Memory Chips

4.1.1 NAND Flash Capacity Contracts Over 30%; DDR4 Sees Hoarding Surge Amid End-of-Life Announcements

1) Market Competition

The global memory chip market continues to be led by industry giants Samsung, SK Hynix, and Micron. Facing tightening supply conditions, all three have shifted their production strategies, reallocating resources toward higher-margin products such as DDR5 and High Bandwidth Memory (HBM), while progressively exiting the lower-margin DDR4 segment.

This shift is reshaping the competitive landscape, creating both challenges and opportunities for domestic Chinese memory manufacturers. These players face mounting pressure in areas such as technological advancement, capacity scaling, and market share acquisition. However, they are also well-positioned to fill emerging supply gaps and strengthen their competitiveness as international players scale back legacy product lines.

2) Supply and Demand Dynamics

On the supply side, major memory manufacturers began implementing production cuts in Q1 2025. In June, Samsung officially ceased production of MLC (Multi-Level Cell) NAND. Cumulatively, NAND flash capacity from original manufacturers has now declined by over 30%. In parallel, DDR4 end-of-life (EOL) schedules have been successively released, leading to reduced availability. As a result, the spot price of DDR4 has now surpassed that of DDR5 with comparable specifications.

On the demand side, the AI boom—particularly in server applications—is driving an accelerated transition of DRAM product portfolios toward high-performance segments such as HBM. In addition, autonomous driving systems in smart vehicles are generating exponentially higher memory requirements compared to traditional automotive architectures. Simultaneously, the proliferation of edge computing devices is fuelling demand for compact, high-reliability memory solutions with small to medium capacity.

3) Pricing Trends

DRAM: DDR4 spot prices surged by 50% in June. Micron's 8GB DDR4 was quoted at $2.70, while Samsung's equivalent reached $4.80. For 16GB DDR4 modules, spot prices have exceeded $6.00.

NAND: In May, the average price for 128GB NAND reached $2.92, representing a 4.84% month-over-month increase. Prices for enterprise-grade SSD 3D NAND wafers rose by 10%–15%, with an overall Q2 price hike forecasted between 5% and 15%.

eMMC: Prices for 16GB, 32GB, and 64GB eMMC modules have converged to around $3.80. With the phase-out of MLC NAND, downstream devices such as televisions and security systems are being forced to upgrade their storage capacities, further driving demand for higher-density solutions.

May 2025 Storage Chip Lead Times by Manufacturer

Manufacturer	Product Category	Lead Time (Weeks)	Lead Time Trend
SK Hynix	NAND FLASH	6-10	Stable
	eMMC	8-12	Stable
INFINEON	SRAM	12-52	Stable
	NOR FLASH	12-26	Stable
GigaDevice	NOR FLASH	8-12	Stable
	NAND FLASH	6-10	Stable

Source：Data compiled from publicly accessible online data

4.2 GPU

4.2.1 NVIDIA Dominates AIB Market with 92% Share, Intel's Share Drops to 0%

1) Market Overview

According to Jon Peddie Research's June 2025 report, global shipments of PC-based graphics add-in boards (AIBs) reached 9.2 million units in Q1 2025. NVIDIA strengthened its dominance, capturing a commanding 92% market share—cementing its leadership in the high-end discrete GPU segment. AMD's share fell to 8%, while Intel's presence effectively dropped to zero.

In parallel, China's domestic GPU substitution trend has gained significant momentum. Companies such as Cambricon and Hygon Information have achieved key architectural innovations, enabling 7nm GPU products to approach international performance benchmarks—particularly in AI inference power efficiency. As a result, domestic GPU penetration in the Chinese market is projected to exceed 15% in 2025.

2) Supply and Demand Dynamics

Supply：NVIDIA, AMD, and Intel remain the dominant global suppliers of discrete GPUs. In 2025, NVIDIA released multiple RTX 50 series models, while AMD introduced its RDNA4-based graphics cards. Intel had previously launched its Battlemage B-series in Q4 2024. Meanwhile, Chinese players like Moore Threads and Huawei are aggressively scaling R&D and manufacturing efforts, steadily increasing their contribution to the global GPU supply chain.

Demand：While total PC GPU shipments (including integrated graphics) declined by 12% quarter-over-quarter to 68.8 million units in Q1 2025, sector-specific dynamics tell a more nuanced story. Desktop GPU shipments contracted by 16%, and laptop GPU shipments fell by 10%, reflecting overall PC market softness. However, demand for GPUs in data centres and AI computing remains strong. With AI applications expanding across autonomous driving, cloud computing, and industrial simulations, demand for high-performance GPU compute continues to accelerate globally.

3）Pricing Trends

Graphics Cards：Following export restrictions on the RTX 5090, NVIDIA launched a region-specific alternative for China—the RTX 5090D—priced from RMB 16,499. Meanwhile, AMD's RX 9070 series has experienced significant price increases. For example, PowerColor's RX 9070 XT Reaper rose from $599 to $699, and XFX's RX 9070 XT Swift climbed to $730.

Data Centre GPUs：In the enterprise segment, NVIDIA's flagship H100 GPU is priced at RMB 2.2 million, while the newer H200 model carries a 4.5% premium at RMB 2.3 million. The price of the older A100 has been reduced by RMB 150,000 to support inventory clearance. AMD's MI300X remains competitively positioned, priced approximately 20% lower than NVIDIA's H100, providing a cost-effective alternative for high-throughput computing environments.

May 2025 GPU Market Trends by Vendor

Manufacturer	Order Trends	Price Trends
NVIDIA	Upward	Upward
AMD	Stable	Stable
Intel	Stable	Stable
Qualcomm	Stable	Stable

Source：Data compiled from publicly accessible online data

4.3 MCU

4.3.1 Significant Growth in Automotive MCU Market, Accelerating Chinese Substitution

1) Market Overview

The rapid development of intelligent electric vehicles is steadily increasing the adoption of 32-bit MCUs, which now account for nearly 80% of the automotive sector. From a product trend perspective, 32-bit MCUs are poised for substantial growth in the coming years, with their market share continuing to rise as they increasingly replace older, lower-end 8/16-bit products. Additionally, breakthroughs in the application of RISC-V architecture within the automotive domain are creating new development opportunities for the MCU market.

2) Supply and Demand Dynamics

Supply: According to the "2025 Global Automotive-Grade MCU Industry Technology Development and Market Outlook Analysis Report," global foundry capacity is increasingly skewing towards automotive-grade production, with 12-inch wafer production lines now accounting for over 70% of the total. In the design phase, international giants are reducing development costs through modular IP cores, while domestic Chinese enterprises tend to jointly define chip specifications with OEMs (Original Equipment Manufacturers). Furthermore, with continuous advancements in process technology, 40nm and below processes account for over 60% of production, and some high-end vehicles are beginning to adopt 16nm FinFET process-based domain controller-level MCUs.

Demand: The global automotive-grade MCU market size is projected to reach $12 billion in 2025, maintaining a compound annual growth rate of over 14%. As the penetration rate of new energy vehicles surpasses 40% and intelligent driving technology rapidly iterates from L2 to L3/L4, demand for automotive-grade MCUs is experiencing explosive growth. In terms of application areas, the share of traditional powertrain MCUs has decreased, while the demand for MCUs related to intelligent cockpits and autonomous driving now accounts for over 45%.

3) Pricing

Overall Trend: In May 2025, the overall MCU market price remained relatively stable. However, influenced by factors such as process technology upgrades and product structure adjustments, prices for high-end automotive-grade MCU products showed a steady upward trend, while prices for mid-to-low-end products remained relatively flat.

Specific Products: Low-end 8-bit MCUs have seen their prices fall below $0.15. Mainstream 8-bit MCUs are generally priced between $0.15 and $0.6. The average market price for mainstream 32-bit MCUs is around $2. For 32-bit MCU products based on the ARM Cortex-M0, the average price is below $1, with low-end versions having dropped to $0.3.

May 2025 MCU Market Trends by Vendor

Manufacturer	Product Category	Lead Time (Weeks)	Lead Time Trend
ST	8-bit MCU	10-24	Stable
	32-bit MCU	13-16	Shortened
	Automotive MCU	40-52	Stable
INFINEON	8-bit MCU	10-26	Stable
	32-bit MCU	10-26	Stable
	Automotive MCU	32-54	Stable
NXP	8-bit MCU	13-39	Stable
	32-bit MCU	18-39	Stable
	Automotive MCU	18-52	Stable
MICROCHIP	8-bit MCU	4-12	Stable
	32-bit MCU	4-18	Stable

Source：Data compiled from publicly accessible online data

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June 2025
Briocean

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Our global network of over 10,000 vetted suppliers allows us to respond to the unique needs of our clients, from reducing component shortages to achieving significant cost savings. Our robust supplier management system and two state-of-the-art quality assurance centres in Shenzhen and Hong Kong ensure that we deliver reliable, traceable procurement services.

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