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April 2026

Monthly Market Research

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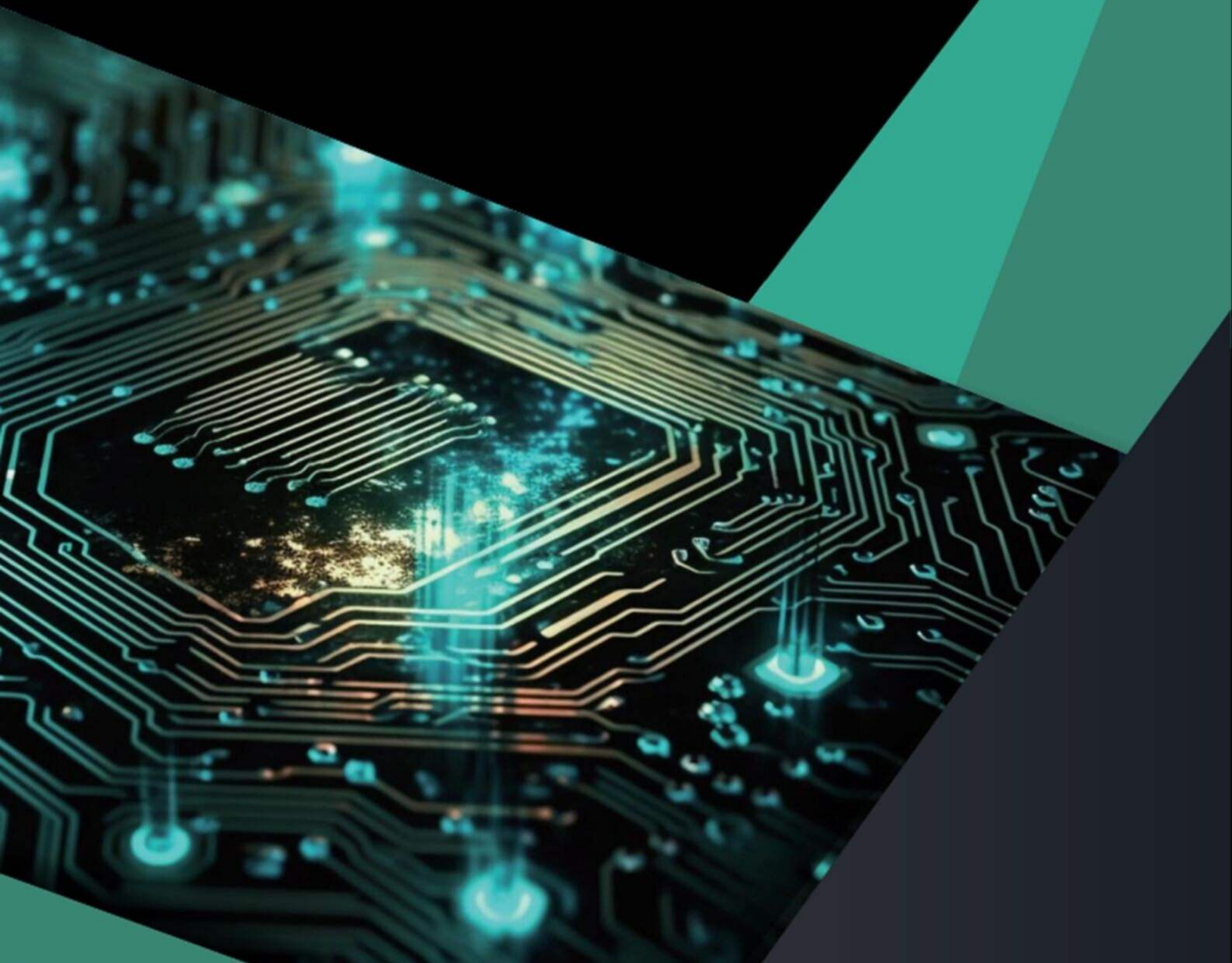
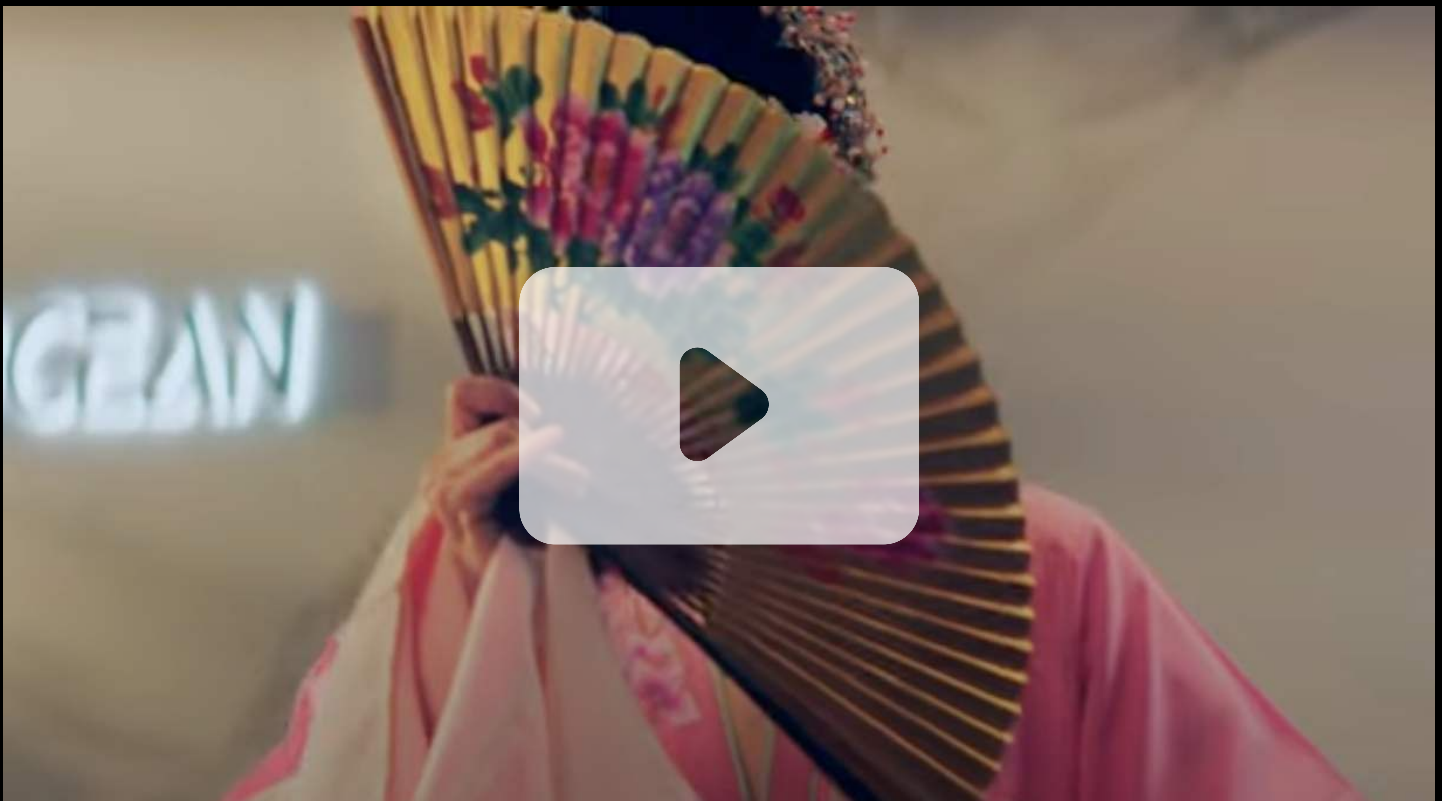


About Briocean

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	- Global: AI Storage Capacity Fully Sold Out; HBM Crowding Out Conventional DRAM, Shortage to Persist Until 2030 - Middle East: Helium Supply Disruption and Energy Price Hikes Drive Semiconductor Material Costs Higher - U.S.: House Foreign Affairs Committee Passes MATCH Act and Other Bills; Extends Existing Capacity Equipment Licenses for Three Chipmakers - Japan: Government Approves Additional JPY 631.5 Billion Subsidy for Rapidus; Cumulative R&D Support Reaches JPY 2.354 Trillion - Taiwan, China: Industrial Innovation Act Amendment Introduces “N-1” Node Restriction; Financial Regulator Raises Fund Holding Cap; TSIA Calls for Strategic Reserves; Authorities Reject U.S. Capacity Relocation Proposal
Industry	- Texas Instruments: Second-Round Price Increase of 15%–85%, Industrial and Automotive Spot Prices Up 30%–60%, Q1 Data Center Revenue Up 90% - Analog Devices: Price Increase of 5%–10%, Lead Times Extended to 39 Weeks, Q1 Communications Revenue Up 63% - Infineon: Automotive IGBT and SiC Prices Up 10%–20%, Select High-End Models Halted, AI Power Device Lead Times at 20–50 Weeks - NXP: Q1 Revenue of USD 3.18 Billion Above Expectations, Automotive MCU Prices Up to 20%, Lead Times Exceed 40 Weeks - STMicroelectronics: STM32F1/F4 Up 10%–12%, H7 Up 15%–18%, General MCU Lead Times 12–18 Weeks, Automotive 36–40 Weeks - Renesas: Q1 Operating Profit Up 49.6%, Industrial Segment Nearly Doubled, Data Center Power IC Lead Times 24–38 Weeks, Price Increase Effective July 1 - Samsung Electronics: DRAM Prices Expected to Rise 30% in Q2, Potential Strike Risk in May, HBM4E Production Planned -SK Hynix: Record Q1 Margin of 72%, HBM Capacity Sold Out, 12-High Hybrid Bonding Validation Completed - NVIDIA: Engaged Samsung and SK Hynix in Physical AI Collaboration Discussions - Micron Technology: USD 1.8 Billion Acquisition of Taichung Facility, Expected to Contribute Over 10% of Global Capacity by 2027 - Kioxia: Temporary Shutdown Due to 7.7 Magnitude Earthquake, TSOP MLC NAND Discontinued, NOR Flash Prices Expected to Rise 40%–50% in Q2 - Seagate Technology: Q3 Revenue USD 3.11 Billion, Capacity Nearly Sold Out Through 2027, Growth Target Raised Above 20% - Intel: Server CPU Prices Up 10%–20%, Lead Times Extended to Six Months, Further Increases Possible in Q3 - UMC: Announced Price Adjustments for Second Half, 8-Inch Wafer Prices Up 10%–15% - TSMC: Capacity Reduction Continues, Plans to Phase Out 8-Inch Fabs by 2027

Category	Trend
End-market (Artificial Intelligence)	- Adobe: Premiere v26.2 & GPU-Accelerated Firefly - Meta: Llama 4 Native Multimodality & MoE Architecture - NVIDIA: Accelerating Gemma 4 for Local Agentic AI - Anthropic & Amazon: $100B Infrastructure & 1M Trainium Chips
End-market (Automotive)	- Tesla: AI5 Chip Tape-out & Global Capacity Impact - Mercedes-Benz: The All-Electric 2026 C-Class Premiere - Toyota: $9.1 Billion Impact and Procurement Relocation - NIO: Scaling In-house Silicon to the Mass Market
End-market (Healthcare)	- GE HealthCare & NXP: AI Innovation in Acute Care - Philips: 2x Reconstruction Speed via Verida AI Infrastructure - J&J MedTech: Automating 3D Cardiac Maps with AI - Medtronic: Scaling AI via $685M Investment and Acquisitions
End-market (Industrial)	- Schneider Electric: "Agentic Manufacturing" & The NVIDIA Partnership - Honeywell: The 2026 "Pure-Play" Transformation - Rockwell Automation: AI-Orchestrated System Design - ABB: Scaling GenAI with Genix Copilot Integration
End-market (Robotics)	- Sanctuary AI: Breakthrough in Hydraulic Dexterity - Unitree: Humanoid Half-Marathon & Hardware Reliability - AgiBot: 10,000 Units & The "Embodied AI" Era - Booster Robotics: Billion-Yuan Boost for Global Delivery
Component Pricing & Product Insights	- Memory Prices Are Rising Though Some Spot Prices Dipped After Early Supply Met Demand - Enterprise Storage Is Surging And AI Storage Is Emerging As A Key Growth Driver - Market Prices Are Increasing With Tight Supply And Domestic Auto-Grade MCU Production Is Speeding Up

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Macro Environment Updates

1. Macro Environment

1.1 Industry Policy

1.1.1 Global: AI Storage Capacity Fully Sold Out; HBM Crowding Out Conventional DRAM, Shortage to Persist Until 2030

In April, Omdia raised its 2026 global semiconductor revenue growth forecast to 62.7%. Computing and storage segment YoY growth is expected to reach 90%, exceeding USD 700 billion, with the DRAM market nearly doubling and the NAND market potentially reaching four times its 2025 level. Significant supply relief is not expected until mid-to-late 2027. Goldman Sachs projects a 2026 DRAM supply-demand gap of 4.9% – the most severe in 15 years. SK Hynix confirmed that all 2026 DRAM, NAND, and HBM capacity is sold out; Micron's entire 2026 HBM capacity is also sold out. SK Group Chairman noted that wafer supply constraints may persist through 2030, with a projected supply shortfall exceeding 20%. Samsung and SK Hynix have raised 2026 HBM3e supply prices by nearly 20%. On April 27, Melius Research gave Micron a "Buy" rating with a USD 700 price target, and SanDisk a "Buy" rating with a USD 1,350 target. SK Hynix reported a 72% operating margin in Q1, with inventory at about four weeks.

1.1.2 Middle East: Helium Supply Disruption and Energy Price Hikes Drive Semiconductor Material Costs Higher

In April, ongoing Middle East geopolitical conflict entered its second month of the Strait of Hormuz blockade, expanding the impact on the global semiconductor supply chain from a single raw material cutoff to areas including energy costs, logistics, and chemical intermediates. Qatar supplies approximately 34% of global helium, all exports of which must transit the Strait of Hormuz. Since the conflict erupted on February 28, helium facilities at Qatar's Ras Laffan Industrial City were attacked, causing a 14% drop in output. Repairs are expected to take 3–5 years. Spot helium prices surged over 151% in one week, with imported high-purity helium rising from CNY 75/m^3 to over CNY 160/m^3 – an increase of more than 113%. Helium has no substitute in wafer cooling and etching processes; a supply cutoff would directly cause wafer overheating and a sharp drop in yields. Samsung and SK Hynix have begun closely monitoring supply and signing additional contracts with U.S. helium suppliers to lock in inventory. Meanwhile, international oil prices jumped over 30% within a week

of the blockade, with Brent crude exceeding USD 100/barrel. The impact on chemical raw materials is evident: naphtha-related material prices rose 20%–30%; Japan's Kaneka announced price hikes of 20% for polyimide film and 30% for optical-grade acrylic resin; Mitsubishi Gas Chemical raised copper-clad laminate prices by 30%; and spot methyl ethyl ketone (MEK) surged 25% in one month. Fitch Ratings warned that if the helium shortage persists, spot price increases could reach 50%–200%.

1.1.3 U.S.: House Foreign Affairs Committee Passes MATCH Act and Other Bills; Extends Existing Capacity Equipment Licenses for Three Chipmakers

On April 22, the U.S. House Foreign Affairs Committee passed en bloc 22 export control-related bills, including the MATCH Act and the CHIP Security Act. The MATCH Act expands control scope from EUV lithography to all immersion DUV lithography tools and cryogenic etching equipment, and imposes a full embargo on five entities – SMIC, Huawei, YMTC, CXMT, and Huahong – prohibiting equipment exports, maintenance, software upgrades, and spare parts replacement. The bill sets a 150-day countdown for allied coordination; if the Netherlands and Japan (ASML, Tokyo Electron) fail to align, it would trigger unilateral extraterritorial controls under the Foreign Direct Product Rule (FDPR). The lead Democratic representative on the House Foreign Affairs Committee proposed an amendment narrowing the target entities to SMIC, YMTC, and CXMT, which was adopted by the committee; the bill continues to advance legislatively. The CHIP Security Act (passed by the committee on March 26) requires that advanced AI chips exported to China incorporate security mechanisms such as location verification, tamper protection, remote disable, and usage tracking, with the Department of Commerce to issue implementation standards within 180 days. The Semiconductor Industry Association (SIA) publicly opposed this, calling the mechanisms untested and potentially infeasible. Separately, the U.S. Department of Commerce has issued 2026 equipment import licenses to Samsung Electronics, SK Hynix, and TSMC, allowing each to maintain existing capacity at their China-based fabs while restricting expansion and technology upgrades. China's Ministry of Commerce responded that it will resolutely take necessary measures to protect the legitimate rights and interests of Chinese enterprises.

1.1.4 Japan: Government Approves Additional JPY 631.5 Billion Subsidy for Rapidus; Cumulative R&D Support Reaches JPY 2.354 Trillion

On April 11, 2026, Japan's Ministry of Economy, Trade and Industry approved an additional JPY 631.5 billion (approx. USD 39.5 billion) subsidy for semiconductor company Rapidus to support the R&D and mass production of its 2nm advanced process AI chips, targeting mass production in the second half of fiscal 2027. This brings total cumulative R&D support from the Japanese government to Rapidus for fiscal years 2022–2026 to JPY 2.354 trillion (approx. USD 160 billion). Rapidus plans an initial public offering (IPO) around fiscal 2031 and is seeking approximately JPY 3 trillion in private financing through government loan guarantees. On the same day, METI also announced up to approximately JPY 90 billion in subsidies for AI semiconductor-related projects at Fujitsu and Japan IBM. Through sustained large-scale fiscal support and accompanying orders, Japan aims to catch up with TSMC and Samsung in the 2nm advanced process field, though Rapidus' subsequent commercialization validation still faces considerable uncertainty.

1.1.5 Taiwan, China: Industrial Innovation Act Amendment Introduces "N-1" Node Restriction; Financial Regulator Raises Fund Holding Cap; TSIA Calls for Strategic Reserves; Authorities Reject U.S. Capacity Relocation Proposal

In April 2026, the amendment to Article 22 of the Industrial Innovation Act formally introduced the "N-1" rule, restricting TSMC's most advanced processes from being exported to overseas fabs, with violators subject to fines up to NTD 10 million (approx. USD 310,000). The Ministry of Economic Affairs will draft sub-laws within six months. On April 23, the Financial Supervisory Commission (FSC) announced an increase in the upper limit for fund investment in a single listed company from 10% to 25%, effective April 24. This rule applies only to TSMC (which accounts for over 40% of the Taiwan stock market's capitalization). After the new policy took effect, TSMC's share price rose more than 5%. On April 8, TSIA called on the government to increase strategic reserves of helium and natural gas, and to support the restart of nuclear power under safety and compliance conditions to ensure stable electricity supply. In response to the U.S. Secretary of Commerce's proposal to relocate approximately 40% of Taiwan's semiconductor capacity to the U.S., Deputy Leader of Taiwan, China, Cheng Li-chun explicitly rejected the request. On April 23, Trump stated that if Taiwan-based chip companies fail to set up plants in the U.S. within 1.5 to 2 years, they would face high tariffs.

1.2 Economic Indicators

1.2.1 Global Manufacturing PMI Eases from Highs in March; Middle East Tensions Raise Supply Chain Cost Pressure

In March 2026, global manufacturing expansion moderated. The JPMorgan Global Manufacturing PMI came in at 51.8, flat MoM and marking the eighth consecutive month above the 50 threshold, indicating continued expansion with stabilizing momentum.

By major economies: U.S. PMI rose to 52.3 (+0.7 pts MoM) with improvements in output and employment; Eurozone PMI increased to 51.6 (+0.8 pts), returning to expansion after several months; Japan PMI declined to 51.6 (-1.4 pts), signaling weaker momentum; China PMI fell to 50.0 (-2.1 pts), at the breakeven level amid softer external demand and rising cost pressure; South Korea PMI rose to 52.6 (+1.5 pts), supported by strong semiconductor exports; India PMI decreased to 53.9 (-3.0 pts) but remained among the fastest-growing major economies. Escalating Middle East geopolitical tensions slowed global trade flows, pushed input cost inflation to a near three-year high, and extended supplier delivery times to the weakest level in nearly three and a half years.

Overall, robust AI chip demand continues to support semiconductor and related manufacturing growth, while supply chain disruptions and rising costs are compressing margins and intensifying regional divergence.

Global Manufacturing by Region PMI

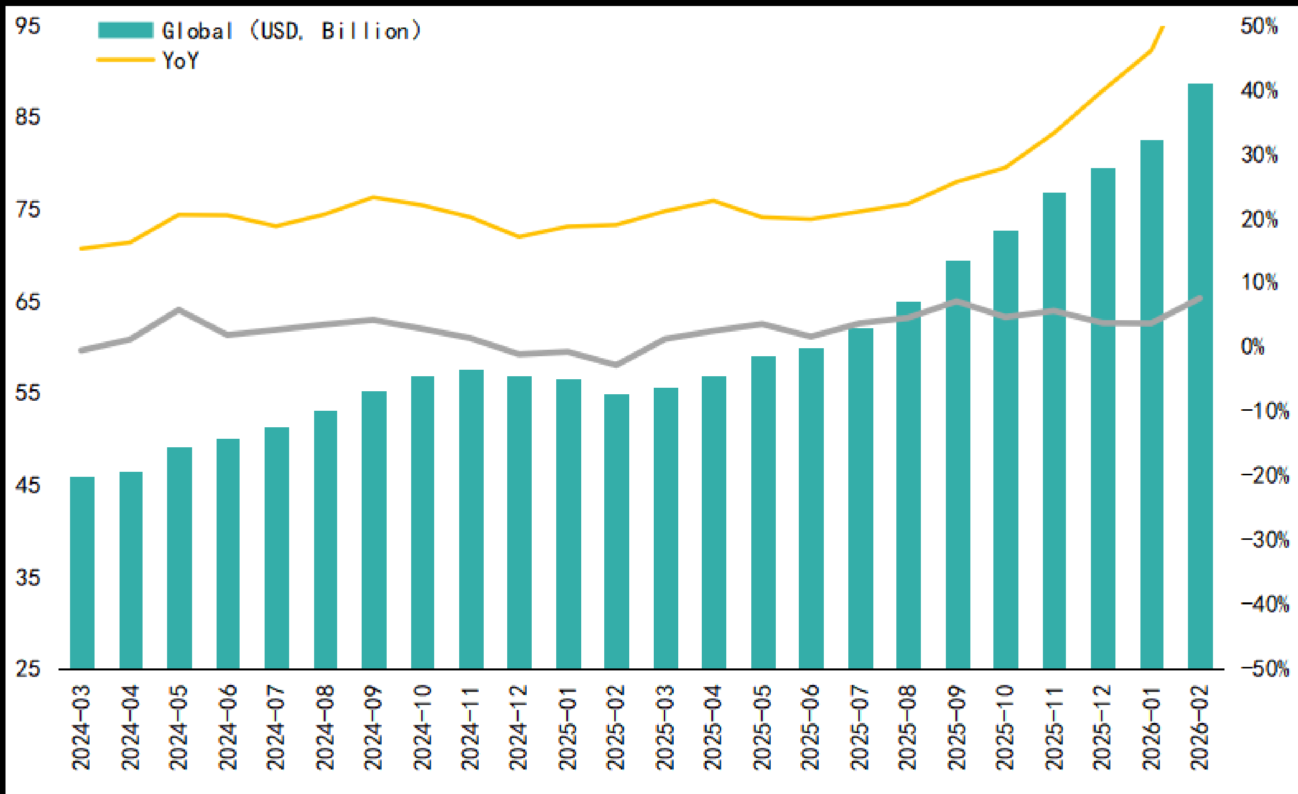
Period	Global	China	Japan	Korea	India	Americas	Eurozone
2023-11	49.30	49.40	48.30	50.00	56.00	46.70	44.20
2023-12	49.00	49.00	47.90	49.90	54.90	47.40	44.40
2024-01	50.00	49.20	48.00	51.20	56.50	49.10	46.60
2024-02	50.30	49.10	47.20	50.70	56.90	47.80	46.50
2024-03	50.60	50.80	48.20	49.80	59.10	50.30	46.10
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
2025-6	50.30	49.70	50.10	48.70	58.40	49.00	50.50
2025-7	49.70	49.30	49.90	48.00	59.20	48.00	49.80
2025-8	50.90	50.50	52.00	48.30	59.30	53.00	50.70
2025-9	50.70	51.20	48.50	50.70	57.70	52.00	49.80
2025-10	50.90	50.60	48.20	49.40	59.20	52.50	50.00
2025-11	50.50	49.90	48.70	49.40	56.60	52.20	49.60
2025-12	50.40	50.10	50.00	50.10	55.00	51.80	48.80
2026-01	50.90	50.30	51.50	51.20	55.40	52.40	49.50
2026-02	51.80	52.10	53.00	51.10	56.90	51.60	50.80
2026-03	51.30	50.00	51.60	52.60	53.90	52.30	51.60

Source : Wind

1.2.2 Global Semiconductor Sales Reach USD 88.7 Billion in February, Up 61.8% YoY, Driven by AI Demand

On April 3, 2026, data released by the Semiconductor Industry Association (SIA) showed that global semiconductor sales reached USD 88.7 billion in February 2026, up 7.6% from January's USD 82.5 billion, and up 61.8% from USD 54.9 billion in February 2025. SIA President and CEO John Neuffer stated that global chip sales maintained strong momentum in February, with the Asia-Pacific, Americas, and China markets as the primary drivers of YoY growth. By region, YoY: Asia Pacific/Other up 93.5%, Americas up 59.2%, China up 57.4%, Europe up 42.3%, Japan down 0.3%; sequential: Americas up 12.6%, Europe up 10.2%, Asia Pacific/Other up 6.0%, China up 3.6%, Japan up 3.0%. SIA expects strong global demand to continue through the year, with full-year global semiconductor sales projected to reach approximately USD 1 trillion.

Global Semiconductor Sales (Billion US Dollars)

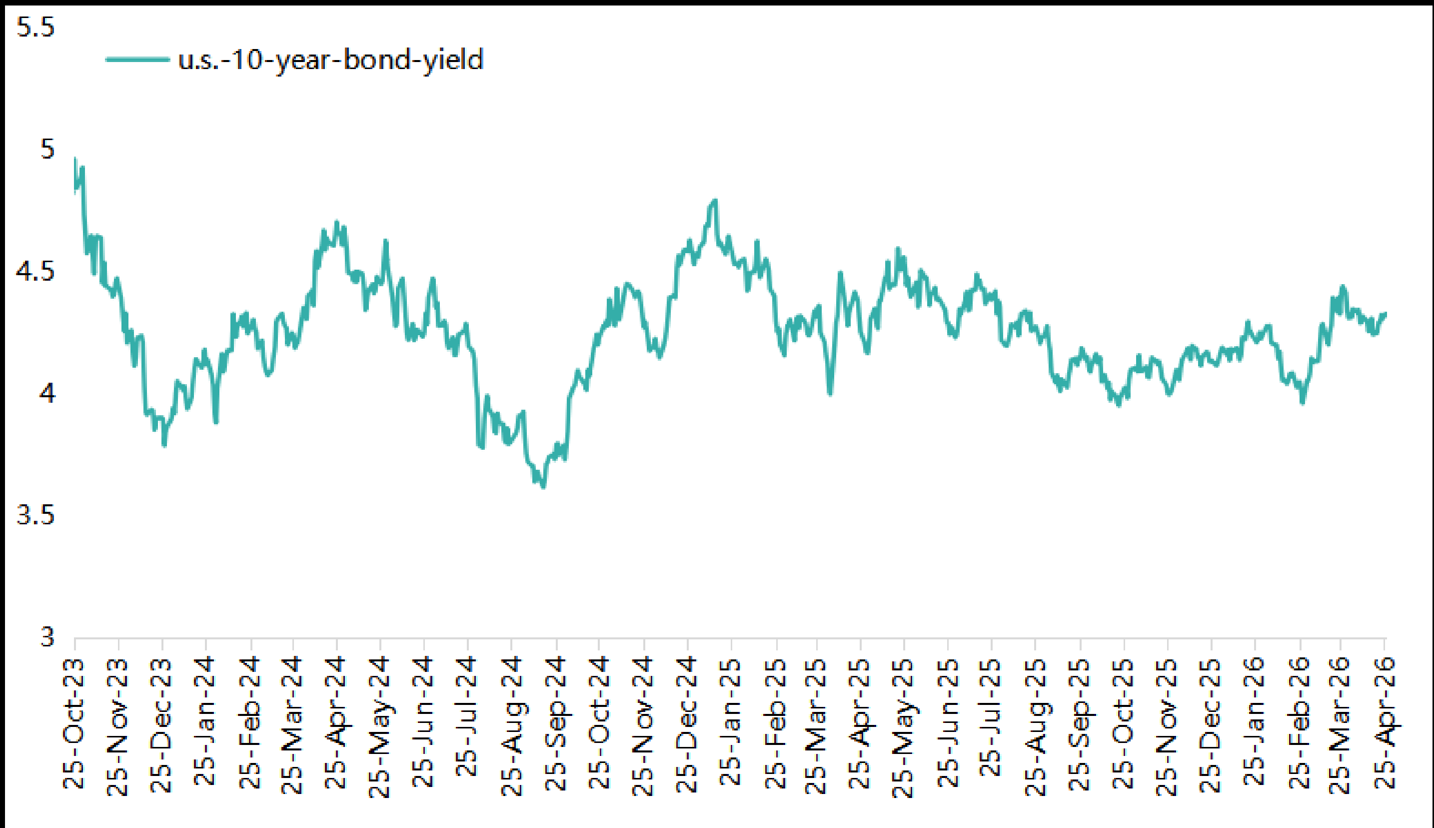


Source：SIA

1.2.3 U.S. 10-Year Treasury Yield Trends Lower in April as Geopolitical Risk Premium Eases

In April 2026, the U.S. 10-year Treasury yield trended downward with volatility, closing at 4.328%, down ~11 bps from 4.44% at end-March; the intra-month low was 4.291% (April 8) and the recent high was 4.484% (March 27), within a ~4.23%–4.48% range. The decline was primarily driven by easing geopolitical risk premiums, as Brent crude prices fell from ~USD 118/bbl at end-March to ~USD 102/bbl by mid-April, reflecting reduced tail-risk concerns over potential disruptions in the Strait of Hormuz. Inflation remained contained, with March U.S. core CPI at 2.6% YoY, below expectations. On monetary policy, the Federal Reserve held rates at 3.50%–3.75% in April, with market expectations pricing in less than one rate cut in 2026. As a global pricing benchmark, the 10-year yield stabilizing around 4.30% has marginally eased valuation pressure on high-growth sectors such as semiconductors, although overall financial conditions remain tight; key watchpoints include U.S.-Iran negotiations and inflation data.

U.S. 10-Year Treasury Yield (%)



Source：Investing

1.2.4 Philadelphia Semiconductor Index Surges Above 10,000 to Record High, Driven by AI Demand and Easing Rate Expectations

In April 2026, the SOX Index surged from 7,545.42 at end-March to 10,513.70 on April 24, with an intraday high of 10,564.00, breaking the 10,000 mark and posting a monthly gain of over 40%, likely the largest since February 2000. The index recorded 18 consecutive trading days of gains since March 31, the longest streak in 32 years. The rally was driven by stronger-than-expected AI compute demand (with NVIDIA market capitalization returning to USD 5 trillion, H100 rental prices up nearly 40% YoY, and global CPU prices entering a 5%–20% upcycle) alongside easing U.S. 10-year Treasury yields from 4.44% to ~4.30%, supporting valuation expansion in high-growth technology sectors. Despite emerging short-term correction pressure after the rapid rally, the semiconductor sector outlook remains positive, supported by sustained AI demand and continued advancement in leading-edge process technologies.

The Philadelphia Semiconductor Index (SOX)

Source：MacroMicro

02

Semiconductor Industry Updates

Semiconductor Industry Overview

Manufacturer	Updates	Key Data	Trend & Impact (Incl. Models)
Texas Instruments (TI)	Post-April 1 second price hike, spot prices in industrial/automotive surged; Q1 data center +90%.	Spot prices up 30%–60%; Q1 revenue USD 4.825 billion (+19%).	Digital isolators, gate drivers (UCC series), PMICs (TPS/TLV series) lead times at 16–26 weeks; pricing for general-purpose devices stabilizing.
Analog Devices (ADI)	Prices up 5%–10%; AI demand extends lead times.	Lead times extended to 39 weeks; Q1 communications +63%, industrial +38%.	Interface isolators (ADuM series), Maxim PMICs (MAX17xxx) at 19–40 weeks; server/automotive demand remains strong.
INFINEON	Automotive IGBT/SiC prices up 10%–20% (high-end 15%–30%); selective order suspensions.	AI power device lead times at 20–50 weeks.	Automotive IGBTs (FS series), SiC modules (CoolSiC™), low-voltage MOSFETs (IPW/IPB/IKW series); capacity increasingly allocated to AI.
NXP	Q1 revenue USD 3.18 billion above expectations; automotive MCU prices up to +20%.	Lead times for automotive MCUs and CAN transceivers exceed 40 weeks; TEF8388 radar in mass production.	Key models: S32K, MPC57 series; TJA1042.
STMicroelectronics	Price increases effective April 26; divergence between general-purpose and automotive.	STM32 F1/F4 +10%–12%, H7 +15%–18%; general MCU lead times 12–18 weeks vs. automotive 36–40 weeks.	General MCU supply improving; automotive-grade MCUs, PMICs, EEPROM remain tight.
RENESAS	Q1 operating profit +49.6%; strong demand for data center power ICs; price increase effective July 1.	Revenue JPY 372.3 billion (approx. USD 2.4 billion, +20.6%); industrial segment profit +99.4%.	Server CPU multiphase controllers (ISL9931, RAA270), SPS lead times 24–38 weeks; dual MOSFET (UPA2756GR-E1-AT) +10%–15%.
SAMSUNG	DRAM prices expected to rise another 30% in Q2; strike risk in May; HBM4E production planned.	DDR5 priced ~45.9% higher than gold; strike may impact 3%–4% of DRAM output.	HBM4E, DDR5 (16Gb), LPDDR5X capacity shifting toward AI; CXL system performance +10.2x.

Semiconductor Industry Overview

Manufacturer	Updates	Key Data	Trend & Impact (Incl. Models)
SK HYNIX	Q1 margin reached 72% (record high); HBM capacity sold out; 12-high hybrid bonding validated.	Revenue KRW 52.58 trillion (approx. USD 38.5 billion); operating profit +405%.	Leading in HBM3E/HBM4 and 321-layer NAND (V9); hybrid bonding equipment secured.
NVIDIA	Met with Samsung and SK hynix on April 29 to discuss physical AI collaboration.	Early-stage with no disclosed projects.	Orin/Thor chips to integrate with HBM and advanced packaging for physical AI.
MICRON	Acquired Rexchip fab for USD 1.8 billion; share price hit record high.	Expected to contribute over 10% of global capacity by 2027; market cap ปกน USD 600 billion.	Expanding HBM and advanced DRAM; LTAs secured through 2028.
KIOXIA	M7.7 earthquake in Japan caused temporary fab suspension; TSOP MLC NAND discontinued.	Production resumed; NOR Flash prices expected to rise another 40%–50% in Q2.	TSOP-packaged MLC NAND (8Gb–64Gb) discontinued; NOR Flash prices continue rising.
SEAGATE TECHNOLOGY	Q3 data center revenue +55%; capacity nearly sold out through 2027; annual growth target raised to 20%+.	Revenue USD 3.11 billion (+44%); free cash flow USD 953 million.	Nearline HDD (Mozaic 4+ 44TB) shipping; Mozaic 5 (50TB) samples by end-2027.
INTEL	Server CPU prices up 10%–20%; lead times extended to six months; further increases possible in Q3.	Consumer CPUs up 5%–10%, with potential additional +8%–10% in Q3.	Xeon 6 series lead times ~6 months; CPU:GPU ratio in AI workloads shifts to 1:4.
UMC	Announced H2 price adjustments on April 16; 8-inch wafer prices up ~10%–15%.	Utilization exceeds 100%; 12-inch mature nodes +5%–10%.	Mature-node foundry capacity tightening, with 8-inch wafers as the core battleground.
TSMC	8-inch capacity to be phased out by 2027.	Monthly capacity ~528,000 wafers; 2nm pricing estimated at USD 26,000/wafer.	Advanced nodes (3nm, 2nm) seeing price increases; 8-inch line shutdown to further tighten mature-node supply.

2.1 Manufacturer Dynamics In-Depth Analysis

2.1.1 Texas Instruments: Second-Round Price Increase of 15%–85%, Industrial and Automotive Spot Prices Up 30%–60%, Q1 Data Center Revenue Up 90%

On April 1, Texas Instruments implemented its second round of price increases, ranging from 15% to 85%, covering key industrial and automotive chips including digital isolators, gate drivers, and power management ICs. Following the adjustment, spot prices for core industrial and automotive products rose by 30% to 60% compared with March, with lead times extending to 16–26 weeks. General-purpose components saw unusually active spot trading, with some supplier quotations valid for only one hour and limited availability of PPV pricing through distributors; certain pre-year orders have been delayed. Q1 results released on April 23 reported revenue of USD 4.825 billion (up 19%) and net profit of USD 1.545 billion (up 31%), with data center revenue increasing by 90% year-on-year, indicating AI server demand is extending from GPUs to analog semiconductors. Q2 revenue guidance of USD 5.0–5.4 billion exceeded market expectations.

2.1.2 Analog Devices: Price Increase of 5%–10%, Lead Times Extended to 39 Weeks, Q1 Communications Revenue Up 63%

A full product line price increase of 5% to 10% took effect on April 1, with the Maxim PMIC portfolio seeing the largest adjustments. Due to AI-driven capacity constraints, lead times extended significantly from below 20 weeks to 39 weeks. Current lead times include 19–22 weeks for interface isolators and switch/multiplexer ICs, 24–40 weeks for linear products, and 19–40 weeks for Maxim devices. In fiscal Q1 2026, communications revenue increased by 63% and industrial by 38%, reflecting strong demand from AI infrastructure investments.

2.1.3 Infineon: Automotive IGBT and SiC Prices Up 10%–20%, Select High-End Models Halted, AI Power Device Lead Times at 20–50 Weeks

Price increases took full effect on April 1, with power switches and ICs rising by 5%–15%, and automotive-grade IGBT, SiC modules, and high-end MOSFETs increasing by 10%–20%, with some high-end products reaching 15%–30%. Certain high-end automotive models have stopped accepting orders. Lead times for AI server power devices are 20–50 weeks, while high-density PMICs exceed 52 weeks. Shortages at Nexperia have driven price increases in Infineon substitute MOSFETs (IPW/IPB/IKW series). Although the Dresden fab will begin operations in summer, supply shortages are unlikely to ease materially in the first half.

2.1.4 NXP: Q1 Revenue of USD 3.18 Billion Above Expectations, Automotive MCU Prices Up to 20%, Lead Times Exceed 40 Weeks

NXP completed price adjustments across more than 9,000 part numbers on April 1, with automotive MCUs rising by up to 20%. Automotive MCUs (S32K, MPC57 series) and CAN transceivers (TJA1042, TJA1044) remain in tight supply, with lead times generally exceeding 40 weeks and reaching 40–50 weeks for some parts. On April 28, NXP reported Q1 2026 revenue of USD 3.18 billion (up 12%), above expectations, with Non-GAAP EPS of USD 3.05. All four segments—automotive, industrial, communications infrastructure, and mobile—recorded growth. The company confirmed mass production of the TEF8388 third-generation radar transceiver, supporting 576-antenna imaging radar for Level 2+ to Level 4 autonomous driving. Q2 revenue is guided at USD 3.35–3.55 billion, significantly above market expectations.

2.1.5 STMicroelectronics: STM32F1/F4 Up 10%–12%, H7 Up 15%–18%, General MCU Lead Times 12–18 Weeks, Automotive 36–40 Weeks

Price increases took effect on April 26, with STM32F1/F4 general-purpose series rising by 10%–12% and STM32H7 high-performance series by 15%–18%. Lead times are 10–26 weeks for low/high-voltage MOSFETs, IGBT, and ESD devices, and 15–28 weeks for 32-bit MCUs. General-purpose F/L series have shortened to 12–18 weeks, while automotive-grade MCUs remain extended at 36–40 weeks. PMICs and EEPROM are experiencing temporary shortages. The divergence in lead times indicates capacity reallocation toward higher-margin automotive products.

2.1.6 Renesas: Q1 Operating Profit Up 49.6%, Industrial Segment Nearly Doubled, Data Center Power IC Lead Times 24–38 Weeks, Price Increase Effective July 1

Q1 results released on April 24 reported revenue of JPY 372.3 billion (approximately USD 2.4 billion), up 20.6%, and operating profit of JPY 125.4 billion (approximately USD 0.8 billion), up 49.6%. The industrial, infrastructure, and IoT segment profit increased by 99.4%. Automotive revenue reached JPY 171.7 billion (approximately USD 1.1 billion), up 10.6%, with operating profit of JPY 61.8 billion (approximately USD 0.4 billion), up 33.8%. Demand for server CPU multiphase controllers and SPS devices (ISL9931, RAA270) remains strong, with lead times of 24–38 weeks and rising spot prices. The company indicated a price increase effective July 1, alongside growing demand for long-term supply agreements.

2.1.7 Samsung Electronics: DRAM Prices Expected to Rise 30% in Q2, Potential Strike Risk in May, HBM4E Production Planned

Samsung announced that DRAM contract prices will increase by 30% in Q2 following a doubling in Q1. As of April 7, server DDR5 16Gb pricing reached approximately KRW 327,749 per gram (approximately USD 240), about 45.9% higher than gold. Around 90% of incremental wafer capacity is allocated to HBM and server DRAM. LPDDR4/4X has entered discontinuation, with full exit by Q1 2027. The 2nm yield rate is approximately 55%. Reports on April 23 indicated a planned full-scale strike from May 21 to June 7; analysts estimate potential disruption of 3%–4% in global DRAM supply and 2%–3% in NAND if realized. Samsung also plans to begin HBM4E engineering sample production in May, targeting NVIDIA's Vera Rubin Ultra platform, while its CXL memory system "Pangea v2" delivers performance improvements of 10.2 times.

2.1.8 SK Hynix: Record Q1 Margin of 72%, HBM Capacity Sold Out, 12-High Hybrid Bonding Validation Completed

Q1 results released on April 23 reported revenue of KRW 52.58 trillion (approximately USD 38.5 billion) and operating profit of KRW 37.61 trillion (approximately USD 27.5 billion), with an operating margin of 72% and net margin of 77%. DRAM average selling prices increased by 60% sequentially and NAND by 70%. HBM capacity for 2026 is fully booked, with demand exceeding supply and shifting toward multi-year agreements. The company began mass production of 321-layer NAND in April. Hybrid bonding validation for 12-high HBM stacks has been completed, with equipment orders placed for integrated systems developed with Applied Materials and Besi (approximately KRW 20 billion, or USD 15 million).

2.1.9 NVIDIA: Engaged Samsung and SK Hynix in Physical AI Collaboration Discussions

On April 29, NVIDIA executives held closed-door meetings in Korea with Samsung Electronics and SK Hynix to explore collaboration in physical AI. Discussions covered integration of NVIDIA's Omniverse platform, robotics systems, and Orin/Thor chips with HBM, advanced packaging, and sensor manufacturing capabilities. The partnership aims to accelerate real-world AI deployment, though discussions remain at an early stage without disclosed timelines or projects.

2.1.10 Micron Technology: USD 1.8 Billion Acquisition of Taichung Facility, Expected to Contribute Over 10% of Global Capacity by 2027

On April 16, Micron completed the USD 1.8 billion acquisition of PSMC's Taichung P5 fab, which includes approximately 300,000 square feet of 300mm cleanroom space for advanced DRAM and HBM production. The facility is expected to contribute over 10% of Micron's global capacity by late 2027. The company's market capitalization approached USD 600 billion, reaching a record high, while customers increasingly sign three- to five-year supply agreements.

2.1.11 Kioxia: Temporary Shutdown Due to 7.7 Magnitude Earthquake, TSOP MLC NAND Discontinued, NOR Flash Prices Expected to Rise 40%–50% in Q2

A magnitude 7.7 earthquake in Iwate on April 20 caused a temporary power outage at Kioxia's Kitakami plants (K1, K2). Operations have resumed, with full recovery expected within one week. The company also announced discontinuation of TSOP-packaged MLC NAND, with final shipments scheduled for March 2027. Driven by AI demand, NOR Flash contract prices are expected to rise by 40%–50% in Q2.

2.1.12 Seagate Technology: Q3 Revenue USD 3.11 Billion, Capacity Nearly Sold Out Through 2027, Growth Target Raised Above 20%

For fiscal Q3 2026, Seagate reported revenue of USD 3.11 billion, up 44%, exceeding expectations. Non-GAAP EPS reached USD 4.10, up 115%, with free cash flow of USD 953 million. Data center revenue was USD 2.5 billion, accounting for 80% of total revenue. Nearline HDD capacity is largely contracted through 2027. Mozaic 4 drives with up to 44TB capacity have shipped, while Mozaic 5 targets 50TB with sampling planned for late 2027.

2.1.13 Intel: Server CPU Prices Up 10%–20%, Lead Times Extended to Six Months, Further Increases Possible in Q3

The CPU market is entering a new price increase cycle driven by AI workloads. Intel raised PC CPU prices in March and further adjusted server CPU pricing on April 1, with server CPUs rising by 10%–20% and consumer CPUs by 5%–10%. Additional increases of 8%–10% are expected in the second half. Lead times for server CPUs have extended to six months, compared with one to two weeks previously. Tight advanced-node capacity remains the core driver, with Intel, AMD, and NVIDIA competing for TSMC's 3nm capacity.

2.1.14 UMC: Announced Price Adjustments for Second Half, 8-Inch Wafer Prices Up 10%–15%

On April 16, UMC notified customers of price increases for the second half of 2026. 8-inch wafers are expected to rise by 10%–15% due to utilization rates exceeding 100% at key fabs, while 12-inch mature nodes will increase by 5%–10%. The tightening supply of 8-inch capacity, driven by both demand growth and legacy line retirements, is the primary driver of this pricing trend.

2.1.15 TSMC: Capacity Reduction Continues, Plans to Phase Out 8-Inch Fabs by 2027

TSMC confirmed that 6-inch and 8-inch production lines are being phased out, with full closure of certain 8-inch fabs planned by 2027. Current 8-inch monthly capacity stands at approximately 528,000 wafers. Global 8-inch capacity is expected to decline further in 2026. The company is guiding customers to migrate toward 12-inch mature nodes or transition to alternative foundry partners.

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03

Application Updates

3. Application Updates Overview

Category	Updates	Insight
Artificial Intelligence	Adobe Premiere colour grading is now fully accelerated by NVIDIA GPUs, targeting professional content creators.	PC upgrade demand: Driving demand for high-end graphics cards, PCIe 5.0 SSDs, and 1000W+ power supplies; these have now become the essential component mix for high-performance AI workstations
Artificial Intelligence	Meta officially begins Llama 4 training, targeting "System 2" reasoning and advanced multimodal intelligence.	Storage pressure warning: Extremely long context cycles will lead to a severe supply shortage of DDR5 (RDIMM) and HBM4， making Long-Term Agreements (LTAs) a strategic necessity for securing high-density memory capacity.
Artificial Intelligence	NVIDIA accelerates Gemma 4 for local agentic AI, moving inference from cloud to edge devices.	Edge AI Explosion: Computing power is being pushed to local devices, driving up the turnover rate of AI PC core CPUs/NPUs and DDR5 5600+ high-frequency memory.
Artificial Intelligence	Anthropic secures 5GW compute capacity from Amazon, deploying over 1 million Trainium2 chips for Claude models.	Opportunities in complementary components: Developing in-house ASICs to bypass general-purpose GPUs. Business opportunities are shifting towards complementary high-performance PMICs, liquid cooling components, and high-speed interface chips.
Automotive	Tesla successfully completes the AI5 chip tape-out, designed to power millions of Robotaxis and Optimus robots.	Capacity grab warning: AI5 production is set to lock up a significant share of advanced-node capacity, shifting demand toward high-end PMICs, 4D millimeter-wave radar chips, and high-power-density inductors that support peripheral systems.
Automotive	Mercedes unveils the all-electric 2026 C-Class, promising a 762km WLTP range and a 39.1-inch AI-powered MBUX Hyperscreen.	Surge in display and interface materials: The adoption of 39-inch large-format displays is directly driving demand for DDIC and SerDes interface chips, with increasing need for high-speed signal buffers across Tier-1 display supply chains.
Automotive	Toyota faces a $9.1B tariff shock, forcing a massive shift of its AI-compute module production to North America.	Production strategy shift: A short-term supply gap has emerged in Southeast Asia production relocation, increasing demand for North America–certified (NCO) automotive-grade storage and power ICs to fill quota shortfalls

Category	Update	Insight
Automotive	NIO founder Li Bin confirms the full deployment of in-house intelligent driving chips in models priced at RMB 200k–300k.	Mid-range models are seeing upgrades in components: As intelligent driving features move into the mass market, demand is rising for LPDDR5 memory and high-density NAND Flash, particularly in higher-volume mid-range segments.
Healthcare	GE HealthCare partners with NXP (Apr 14) to accelerate AI innovation in acute care, requiring high-performance processing.	High reliability hardware standards: The "zero failure" requirement for MCUs/MPUs in emergency medicine makes the NXP i.MX series with automotive-grade reliability and high-precision isolation chips the core entry threshold for intensive care equipment.
Healthcare	Philips secures FDA 510(k) clearance for Verida, an AI-powered spectral CT with a 2x faster reconstruction pipeline.	High-speed computing and storage requirements: Real-time image reconstruction has driven the demand for localization of automotive/industrial grade NVMe SSDs and high-bandwidth GPU accelerators.
Healthcare	Johnson & Johnson debuts CARTOSOUND SONATA, leveraging AI to automate 3D cardiac mapping and imaging.	Image Processing Standards: Real-time 3D modelling mandates high-performance ISPs and DRAM caches; high-bandwidth memory and low-latency chips are now the essential hardware foundation for jitter-free surgical rendering.
Healthcare	Medtronic leads a $100M investment and acquires CathWorks to integrate AI-powered coronary assessments.	Infrastructure expansion: Digital diagnostic platforms have driven long-term procurement demand for Enterprise SSDs and FPGA/ASIC logic chips.
Industrial	Honeywell pivots toward a "pure-play" automation firm, focusing on AI, 5G, and cloud-edge convergence.	High-End Value Shift: The transition toward high-performance logic and industrial-grade storage is redefining the BOM for building automation, establishing high-value silicon as the core procurement priority.
Industrial	Schneider Electric unveils "Agentic Manufacturing" powered by Azure AI, cutting engineering time by 50%.	Infrastructure upgrades: AI factory architectures are driving a surge in demand for HBM, enterprise-grade NVMe SSDs, and high-efficiency power modules, with increasing emphasis on computing hardware at the industrial edge.
Industrial	Rockwell unveils AI-orchestrated factory design at Hannover Messe, leveraging autonomous AI agents and digital twins.	Simulation performance-driven: Accelerated design iterations are raising requirements for edge AI processors and high-speed data buffers, while PLC upgrades are driving faster turnover of core components

Category	Updates	Insight
Industrial	ABB enhances its digital solutions with Genix Copilot， a GenAI tool for industrial device maintenance and efficiency.	Explosive demand for connectivity and storage: Large-scale data synchronization is fuelling sustained demand for industrial-grade Flash storage and high-performance communication modules.
Robotics	Sanctuary AI (Apr 1) demonstrates zero-shot in-hand manipulation on its 8th-gen Phoenix hydraulic robotic hands.	Demand for precision analog chips: Fine-grained operation relies on high-fidelity haptic feedback, driving demand for precision analog components. High-sampling-rate ADCs and DRAM-intensive inference modules will be critical to handle the growing burden of sensory data processing.
Robotics	Unitree H1 completes a humanoid half-marathon in Beijing, proving industrial-grade autonomous hardware reliability.	Breakthrough in motion control components: Long-distance movement has validated the durability of high-power servo motor drivers and high-precision magnetic encoders. This opens up stocking opportunities for components aligned with mass-production models.
Robotics	AgiBot unveils new-gen robots (Expedition A3, Lingxi X3, G2 Max) and hits the 10,000-unit production milestone.	Automotive-grade supply chain shift: Logic Components is fully transitioning to automotive-grade BOMs, creating strong demand for high-density industrial/automotive-grade NAND and multi-axis motion control chips at scale.
Robotics	Booster Robotics raises nearly 1 billion yuan to build a global delivery network and upgrade its K1 humanoid line. Booster Robotics.	High-growth capacity guarantee: Large-scale financing is accelerating capacity expansion, establishing high-performance logic chips and PMICs as the core procurement and supply priority to support the delivery of explosive global orders.

3.1 Artificial Intelligence

3.1.1 Adobe: Premiere v26.2 & GPU-Accelerated Firefly

Adobe Premiere Pro v26.2 introduces a redesigned Color Mode and generative AI video tools powered by Firefly. The update features five new GPU-accelerated transitions (including Channel Blur and Gradient) and an AI-powered Quick Selection Brush for rotoscoping. By integrating NVIDIA CUDA-X libraries, Adobe has optimized these agentic workflows to deliver real-time cloud streaming and high-fidelity 3D digital twins via NVIDIA Omniverse, significantly reducing rendering latency for enterprise-scale content production. This technical evolution accelerates the shift from cloud-based rendering to local GPU-intensive computing, directly driving bundled demand for RTX 50-series GPUs, 1000W+ high-spec PSUs, and PCIe 5.0 SSDs, establishing these as the essential hardware configuration for next-generation AI workstations.

3.1.2 Meta: Llama 4 Native Multimodality & MoE Architecture

Meta released the Llama 4 series, featuring the Scout (109B total/17B active) and Maverick (400B total/17B active) models. This iteration marks a structural shift to Mixture-of-Experts (MoE) architecture and native multimodality, utilizing "early fusion" to integrate text and vision tokens into a unified backbone. Notably, the Scout model supports a context window of up to 10M tokens, and with Int4 quantization, both models are optimized to fit on a single NVIDIA H100 GPU. The 10M extended context window places extreme demands on DRAM bandwidth and capacity, which will exacerbate supply tightness for DDR5 (RDIMM) and HBM4. As memory shortages loom for H2 2026, the use of Long-Term Agreements (LTAs) has become a critical strategic tool for high-demand enterprises to ensure the supply stability of these high-density memory modules.

3.1.3 NVIDIA: Accelerating Gemma 4 for Local Agentic AI

NVIDIA announced full optimization for Google's Gemma 4 open models via the NVIDIA RTX AI Toolkit. By leveraging TensorRT-LLM and INT4 quantization, NVIDIA has shifted complex AI inference from the cloud to local RTX-powered PCs and workstations, achieving a 3x performance boost in agentic workflows. Gemma 4 is now natively supported within NVIDIA AI Workbench, enabling developers to build low-latency, privacy-focused "Agentic AI" that operates entirely on the edge, significantly reducing reliance on centralized data center infrastructure. The localized compute trend is accelerating the AI PC replacement cycle, establishing NPU-integrated CPUs and DDR5 5600+ high-frequency memory as the new performance benchmark for enterprise-grade agentic workstations.

3.1.4 Anthropic & Amazon: $100B Infrastructure & 1M Trainium Chips

Amazon announced an additional $5 billion investment in Anthropic (totaling $13B), with plans for up to $100 billion in compute spending over 10 years. Anthropic currently utilizes over one million Trainium2 chips in "Project Rainier," one of the world's largest compute clusters. The new agreement secures up to 5GW of compute capacity in H1 2026, expanding to 6GW by year-end with the introduction of Trainium3 silicon. This massive deployment underscores the industry's shift toward in-house ASICs to mitigate NVIDIA supply constraints. The massive pivot to in-house ASICs signals that hyperscalers are gradually decoupling from generic GPU supply chains. Business opportunities are shifting from general-purpose chips toward the high-efficiency PMICs, advanced liquid cooling components, and specialized high-speed interconnect chips required for custom ASIC clusters.

3.2 Automotive

3.2.1 Tesla: AI5 Chip Tape-out & Global Capacity Impact

Tesla confirmed the successful tape-out of its AI5 chip. Specifically engineered for high-inference autonomous driving and robotics, the AI5 is expected to be 10x more powerful than the current Hardware 4 (HW4). Elon Musk projected that long-term demand for Tesla's proprietary silicon could reach 200 billion units per year to support the global Robotaxi fleet and Optimus production. This volume would consume a significant portion of global 3nm/5nm wafer capacity, potentially tightening supply for other automotive SoC buyers. This massive scale-up in proprietary silicon will likely squeeze advanced node availability, forcing Tier-1 automotive suppliers to accelerate their move toward specialized power management ICs (PMICs) and high-speed data interconnects that complement Tesla's in-house architecture.

3.2.2 Mercedes-Benz: The All-Electric 2026 C-Class Premiere

Mercedes-Benz celebrated the world premiere of its first all-electric C-Class. The flagship C400 4MATIC features a 94kWh battery, delivering a 762km WLTP range and a 0-100km/h sprint in 4.0 seconds. Built on an 800V architecture, it supports 330kW DC charging, adding 325km of range in just 10 minutes. The interior is dominated by a 39.1-inch MBUX Hyperscreen powered by the new MB.OS, which integrates advanced AI for complex passenger interactions and navigation. The shift toward ultra-wide 8K-ready cockpits is driving a surge in demand for Display Driver ICs (DDICs) and high-bandwidth SerDes interface chips, necessitating long-term supply agreements with display module manufacturers to mitigate high-resolution panel component shortages in the premium EV segment.

3.2.3 Toyota: $9.1 Billion Impact and Procurement Relocation

Toyota is navigating a projected $9.1 billion negative impact due to new U.S. tariffs on critical raw materials and components. To mitigate these costs, Toyota is aggressively restructuring its supply chain to reach a 54.4% domestic production rate in the U.S. For electronics procurement, this means a large-scale relocation of Tier-1 module assembly. This transition is creating a temporary "procurement vacuum" in Asia while spiking demand for North American-certified automotive-grade storage and power IC. This regional pivot underscores the critical importance of Non-China Origin (NCO) component sourcing and localized logistics optimization as essential safeguards for production continuity amid rapid assembly line shifts to North America.

3.2.4 NIO: Scaling In-house Silicon to the Mass Market

NIO founder Li Bin announced that the company will fully apply its flagship-grade intelligent driving chips and self-developed operating system in models priced between RMB 200,000 and 300,000. By moving from third-party solutions to in-house silicon, NIO aims to significantly reduce per-vehicle costs while optimizing for its specific AI model training. This move signals a major shift where mid-range EVs are now becoming massive consumers of high-performance logic and high-density NAND, as sophisticated autonomous driving stacks become a standard feature in non-premium segments. This democratization of ADAS hardware will drive high-volume demand for automotive-grade LPDDR5 memory and high-density NAND flash, as mass-market models begin to adopt high-performance computing specs traditionally reserved for luxury tiers.

3.3 Healthcare

3.3.1 GE HealthCare & NXP: AI Innovation in Acute Care

GE HealthCare announced a strategic collaboration with NXP Semiconductors to accelerate AI innovation specifically for acute care (emergency/intensive care) settings. This partnership focuses on embedding NXP's high-performance processing capabilities into GE's medical devices to enable real-time, AI-driven patient monitoring. For the chip market, this signals a major push for automotive-grade reliability in medical MCUs and MPUs, as the critical nature of acute care requires Zero-Downtime logic and high-speed data throughput at the patient's bedside. This trend establishes a new baseline for medical hardware, where high-reliability application processors and isolated power modules are now essential; specifically, medical-certified i.MX series and precision analog components that meet stringent life-safety standards have become the mandatory specification for next-generation acute care systems.

3.3.2 Philips: 2x Reconstruction Speed via Verida AI Infrastructure

Philips received FDA clearance for its Verida Spectral CT system. A critical technical detail is the new AI-based deep learning reconstruction engine, which enables the system to reconstruct 145 images per second—completing entire exams in less than 30 seconds, which is 2x faster than previous generations. This massive increase in throughput is supported by updated computing infrastructure within the CT gantry, requiring localized high-speed NVMe SSDs and high-bandwidth GPU accelerators to handle the real-time spectral data stream. From a distribution perspective, this surge in throughput necessitates a shift toward industrial-grade NVMe storage and advanced cooling solutions within the imaging gantry to manage the heat and data density generated by AI-driven spectral processing.

3.3.3 J&J MedTech: Automating 3D Cardiac Maps with AI

Johnson & Johnson MedTech launched the CARTOSOUND SONATA module. This AI-powered tool automatically transforms intracardiac echocardiography (ICE) images into high-fidelity 3D maps of heart chambers. For the hardware market, the automation of these maps requires specialized Image Signal Processors (ISPs) and advanced DRAM buffers to process and render live anatomical data with minimal jitter. This represents J&J’s shift toward "intelligent" electrophysiology, where real-time AI modeling is now a core hardware requirement. This technological leap establishes high-bandwidth DRAM and low-latency signal processing chips as the mandatory hardware foundation for next-generation surgical BOMs.

3.3.4 Medtronic: Scaling AI via $685M Investment and Acquisitions

Medtronic has committed over $685 million to its cardiovascular AI portfolio, including a $585 million acquisition of CathWorks. This strategic investment aims to deploy AI-driven FFR (Fractional Flow Reserve) measurements globally. To support this, Medtronic is building out a specialized AI diagnostic infrastructure that requires robust Enterprise SSDs and high-performance FPGA/ASIC chips for low-power, high-speed coronary image processing, ensuring Medtronic remains a top-tier consumer of advanced logic silicon in 2026.This consolidation establishes enterprise-grade Flash storage and specialized AI accelerators as the strategic procurement baseline for sustaining global-scale digital diagnostic infrastructure.

3.4 Industrial

3.4.1 Honeywell: The 2026 "Pure-Play" Transformation

Honeywell announced the sale of its Productivity Solutions and Services (PSS) business to Brady Corporation. This move is part of its strategic overhaul to become a "Pure-Play" Automation firm by late 2026. By divesting legacy hardware, Honeywell is reallocating capital toward Industrial Autonomy, 5G, and Cloud-Edge convergence. For the chip market, this means Honeywell is moving away from high-volume, low-margin barcode scanners toward high-value, high-performance logic silicon and industrial-grade DRAM/SSD for its autonomous building and factory systems. This strategic pivot marks a decisive move toward high-performance logic controllers and industrial-grade memory as the essential hardware standard for next-generation autonomous infrastructure.

3.4.2 Schneider Electric: "Agentic Manufacturing" & The NVIDIA Partnership

Schneider Electric unveiled its "Agentic Manufacturing" platform powered by Microsoft Azure AI. This system uses autonomous AI agents to manage the entire manufacturing lifecycle, successfully cutting engineering time by 50% (reducing tasks from weeks to hours). Furthermore, Schneider and NVIDIA introduced a new reference design for the NVIDIA Vera Rubin NVL72 architecture. These "AI Factories" require massive infrastructure—specifically high-bandwidth memory (HBM) and enterprise NVMe SSDs—to support the power-dense, low-latency demands of large-scale AI workloads at the industrial edge. The rollout of these AI-native reference designs establishes enterprise-grade NVMe storage, HBM, and high-density power modules as the mandatory infrastructure standards for high-performance AI manufacturing nodes.

3.4.3 Rockwell Automation: AI-Orchestrated System Design

Rockwell Automation announced at Hannover Messe a fundamental shift toward AI-orchestrated factory design. By integrating autonomous AI agents with closed-loop digital twin validation, Rockwell is enabling engineers to move from a validated model to a fully tested controller project before any hardware deployment. This "AI-native" workflow significantly accelerates design iterations, driving demand for high-performance edge AI processors and high-speed data buffers capable of running complex simulations at the plant level. This "virtual-first" engineering model establishes high-performance edge AI SoCs and low-latency data buffers as the critical hardware benchmarks for accelerating industrial digital twin environments.

3.4.4 ABB: Scaling GenAI with Genix Copilot Integration

ABB enhanced its flagship industrial device digital solutions with Genix Copilot integration. Developed in collaboration with Microsoft, this GenAI solution helps industrial companies contextualize vast amounts of data for prescriptive maintenance. The rollout of such AI-driven maintenance tools across ABB's 60,000+ customer base is driving a surge in demand for industrial-grade Flash storage and high-performance connectivity modules, as constant data synchronization with the cloud is required for large-scale AI modeling. The broad deployment of GenAI across ABB’s installed base establishes industrial-grade Flash storage and high-throughput connectivity modules as the essential hardware foundation for sustaining large-scale cloud-to-edge data synchronization.

3.5 Robotics

3.5.1 Sanctuary AI: Breakthrough in Hydraulic Dexterity

Sanctuary AI demonstrated zero-shot in-hand manipulation using its 8th-generation Phoenix hydraulic robotic hands. This allows the robot to manipulate objects (like a lettered cube) without prior training for that specific task, mimicking human-level dexterity. The hardware relies on high-fidelity tactile feedback and high-speed analog-to-digital converters (ADCs) to process real-time pressure data. This breakthrough in "fine manipulation" is driving a new hardware requirement for precision analog chips and DRAM-heavy inference modules that can handle the massive sensory input required for delicate robotic movements. This shift toward complex tactile sensing establishes high-precision ADC chips and high-bandwidth memory (HBM) as the critical hardware benchmarks for achieving zero-shot learning at the robotic edge.

3.5.2 Unitree: Humanoid Half-Marathon & Hardware Reliability

Unitree’s H1 humanoid robot successfully completed a half-marathon in Beijing's E-Town, competing in the autonomous category. This event was not just a speed trial but a rigorous test of hardware durability and thermal management for high-torque motors and onboard computing nodes. Successfully completing a 21km run demonstrates that Unitree’s hardware can maintain stability under prolonged high-load conditions.The successful completion of this long-distance endurance test establishes high-performance servo drive controllers and vibration-resistant localized storage as the validated hardware standards for mass-produced humanoid robots in industrial and outdoor environments.

3.5.3 AgiBot: 10,000 Units & The "Embodied AI" Era

AgiBot unveiled its new generation of robots, including the Expedition A3 and Lingxi X3, while celebrating the rollout of its 10,000th humanoid robot. The acceleration is staggering: with 5,000 units produced in Q1 2026 alone, AgiBot has moved from "development" to "real-world deployment." For semiconductor distributors, AgiBot's "AgiOS" architecture and its transition to automotive-grade components signify a major shift in the robotics BOM, requiring high-density Industrial-grade NAND/DRAM and multi-axis motion control chips at an unprecedented scale. This mass-production milestone establishes automotive-grade logic components and high-density industrial/automotive-grade NAND as the mandatory hardware standard for scaling embodied AI platforms to the 10,000-unit tier.

3.5.4 Booster Robotics: Billion-Yuan Boost for Global Delivery

Booster Robotics announced it had completed a financing round of nearly 1 billion yuan, led by the Beijing High-Precision Industry Fund. The company's commercial performance in Q1 2026 was explosive, with shipments surging 500% year-on-year and new orders jumping over 800%. Its flagship K1 model has already reached over 1,000 units across 20 countries. For the electronic components market, this rapid scaling requires a steady supply of high-performance logic chips and power management ICs (PMICs) to support Booster's aggressive "competition plus education" and industrial deployment strategy. This capital injection establishes high-performance processors and power ICs as the critical strategic inventory priority required to sustain the rapid acceleration of international delivery and large-scale industrial deployment.

04

Product Updates

4. Product Updates

4.1 Memory Chips

Memory Chips Market Key Movements (April 2026)

Product Category	Price Trend	Lead Time (Weeks)	Supply-Demand Status
DDR4	Rising	20-30	Tight
DDR5	Rising	16-24	Tight
HBM	Rising	12-52	Tight
NAND Flash	Rising	12-26	Tight
NOR FLASH	Rising	8-26	Tight
eMMC	Rising	52+	Tight
SRAM	Stable	12-52	Tight

Source: Eastmoney, Sina Finance

4.1.1 Memory Prices are Rising Though Some Spot Prices Dipped After Early Supply Met Demand

1) Product Updates

DDR4: TrendForce estimates that in Q2 2026, consumer DRAM contract prices (mainly DDR4) will rise 45%–50% quarter-on-quarter, while spot prices have seen a sharp correction. In the first week of April, DDR4 8GB and 16GB module prices in China fell by 25%, with 32GB down 9%.

DDR5: In Q2, original DDR5 prices rose about 30% overall. According to CFM, in April 2026 DDR5 RDIMM 32GB, 64GB, and 96GB prices increased to $650, $1,220, and $1,980.

HBM: The HBM market continues to rise, with Goldman Sachs expecting the shortage to last until 2027, while HBM3E contract prices rose over 200% year-on-year in Q1 2026 and may increase another 30% to 50% quarter-on-quarter in Q2.

NAND Flash: TrendForce latest forecast shows NAND Flash contract prices in Q2 2026 will rise 70%–75% QoQ to a new cycle high, while spot prices have fallen 30%–40% over the past month. Upstream NAND wafer foundry pricing has been sharply increased, with capacity already booked through end-2026.

2) Market Trends

Deepening supply-demand imbalance: Global memory chip supply-demand imbalance is worsening. Goldman Sachs projects in an April report that the 2026 DRAM supply gap will reach 4.9%, far above the previous 3.3% estimate and the worst in 15 years, while NAND and HBM gaps are expected at 4.2% and 5.1% respectively.

Reversal in manufacturers' capacity allocation logic: Major memory chip manufacturers are adjusting their capacity allocation strategies. Bank of America Merrill Lynch noted in an April weekly report that traditional DRAM profitability has now surpassed HBM, reducing major memory makers' enthusiasm for expanding HBM capacity, with some capital originally allocated to HBM being redirected to conventional DRAM and even NAND.

4.2 Storage Devices

Storage Device Lead Times by Vendor (April 2026)

Manufacturer	Product	Lead Time (Weeks)	Lead Time Trends
SAMSUNG	Consumer-grade SSD	16-24	Delivery delayed
KIOXIA	Enterprise NAND/SSD	20 to 40 and above	Delivery delayed
DELL TECHNOLOGIES	PowerEdge + Storage Systems	20–28	Delivery delayed

Sources: Sina.com

4.1.2 Enterprise Storage is Surging and AI Storage is Emerging as a Key Growth Driver

1) **Product Update**

SSD: Leading manufacturers such as Samsung and Kingston Technology have raised prices across their SSD product lines by at least 10%, with some consumer PCIe 4.0 SSDs now up 3–4 times from last year's lows.

HDD: HDDs continue a strong uptrend in both price and demand, with mainstream models up about 46% on average and some rising over 60%. A report by Morgan Stanley estimates a 2026 HDD shortage of about 200EB, with supply-demand balance delayed until 2029.

2) Market Trends

Market divergence; consumer demand is cooling while enterprise demand is booming: Consumer SSD prices have corrected by 15%–20% and memory modules continue to decline, while enterprise SSDs remain strong and rising due to robust AI data center demand.

AI "storage capacity" is emerging as a second competitive frontier alongside computing power: In AI servers, GPUs spend about 70% of their time waiting for data. Enterprise 30TB SSDs have surged from $3,000 to $17,500 within a year, a 472% increase, and Huawei forecasts that AI storage demand will grow 500× by 2035.

4.3 MCU

MCU Lead Times by Vendor (April2026)

Manufacturer	product	Lead Time (weeks)	Lead Time Trend
NXP	8-bit MCU	16-39	Stable
NXP	32-bit MCU	16-39	Stable
NXP	Automotive-Grade MCU	18-52	Stable
Renesas	8-bit MCU	14-18	Stable
Renesas	32-bit MCU	14-18	Stable
Renesas	Automotive-Grade MCU	24	Stable
STMicroelectronics	8-bit MCU	13-33	Stable
STMicroelectronics	32-bit MCU	13-23	Stable
STMicroelectronics	Automotive-Grade MCU	40-52	Stable
Infineon	8-bit MCU	10-26	Stable
Infineon	32-bit MCU	10-26	Stable
Infineon	Automotive-Grade MCU	32-45	Stable
Microchip	8-bit MCU	4-12	Stable
Microchip	32-bit MCU	4-18	Stable

Source : Future Electronic

4.3.1 Market Prices are Increasing with Tight Supply and Domestic Auto-grade MCU Production is Speeding Up

1) Product update

Supply and demand are jointly driving broad MCU price increases: Since April, major MCU makers have raised prices across the board: STMicroelectronics by 10%–18%, NXP Semiconductors automotive MCUs by 8%–20%, and Infineon Technologies automotive MCUs and power devices by 5%–20%. The main drivers are capacity diversion toward AI servers and rising upstream material costs.

Lead times are extending, with supply pressure likely to persist into Q4: Automotive-grade and high-end 32-bit MCUs are generally seeing lead times of 16–24 weeks, with some scarce models exceeding 30 weeks. Certain legacy models from Microchip Technology reach up to 52 weeks. Even standard MCUs now have lead times of around 23 weeks (about 6 months), and tight supply is expected to last through Q3–Q4 2026.

2) Market Trend

Humanoid robots are emerging as a new growth driver for MCU demand: MCUs in robots handle motor control, sensor data processing, and real-time communication, with each unit requiring dozens of chips. However, industry estimates suggest current global wafer capacity can only meet about 2% of demand for a billion-scale robot market, while chip capacity expansion cycles take over 3 years, making the short-term supply gap difficult to close.

Domestic automotive-grade MCU production is accelerating: Dongfeng DF30 chips have completed validation in multiple vehicle models and passed extreme cold tests, moving toward mass production and deployment. SemiDrive has shipped over 12 million automotive-grade chips, covering seven of China's top ten OEM groups. Industry forecasts suggest that by 2026, domestic automotive chip market share in China will rise to 35%.

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