BRIOCEAN

May 2026

Monthly Market Research

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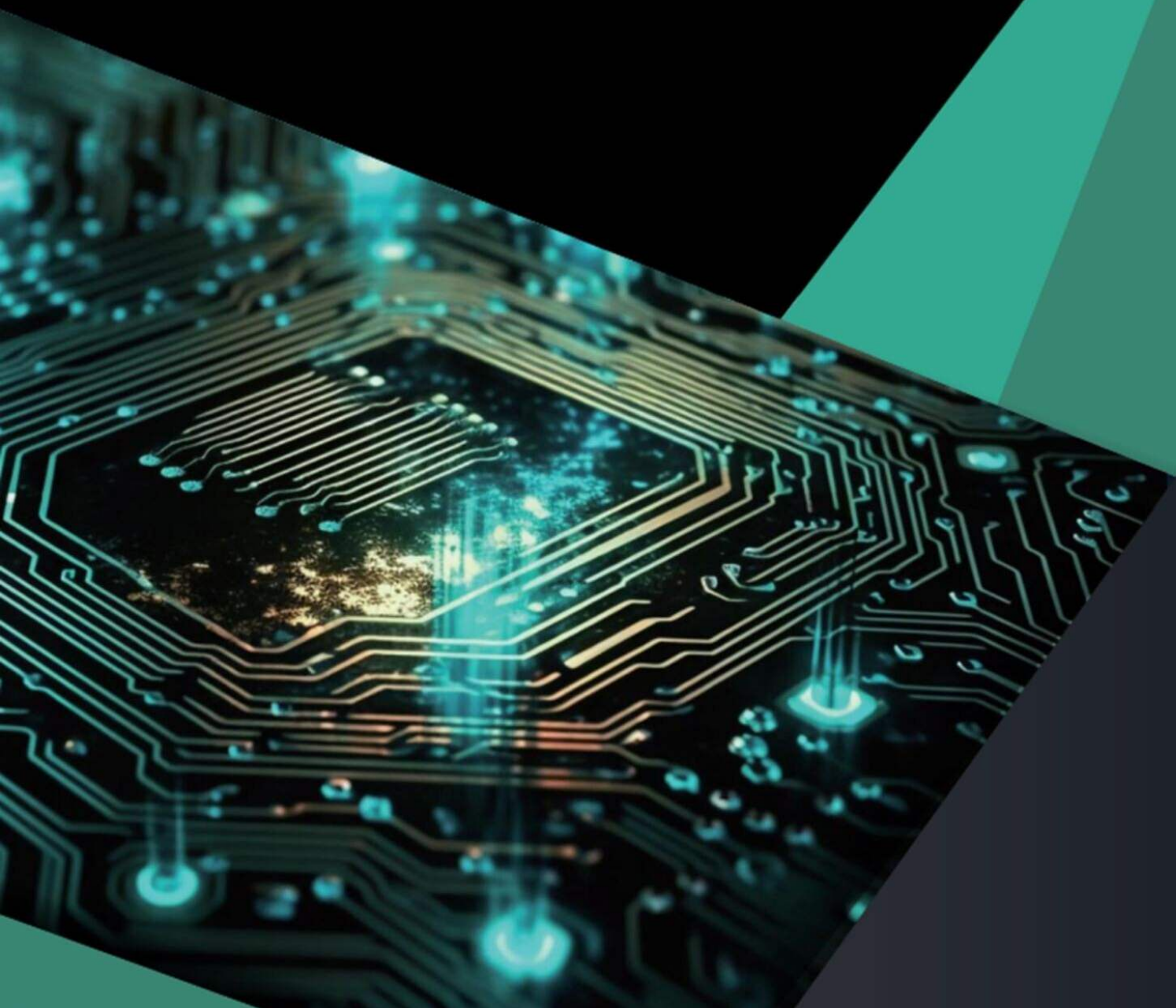

About Briocean

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	- U.S.: Trump Visits China with Semiconductor Executive Team, H200 Chip Exports to China Moderately Relaxed -EU: Approves EUR 288 Million German State Aid, Boosts EUV Optical Modules and Silicon Carbide Materials - Japan: Removes JPY 30 Billion Investment Threshold, Expands Subsidies for Legacy Chips - South Korea: May Semiconductor Exports Surge 169.4% YoY, Hitting Record High on AI Demand - Taiwan, China: Q1 GDP Up 13.69%, 39-Year High, While Semiconductor Strength Masks Broad Industrial Decline
Industry	- Global Semiconductor Market: Q1 Sales Hit Record USD 298.5 Billion, March Up 79.2% YoY - Infineon: Second Price Hike of the Year Effective July 1, AI Drives Structural Shortage in Power Semiconductors - Texas Instruments: Following April 1 Price Hike, Second Round Set for July 1 - STMicroelectronics: Second Price Hike in Three Months, Cost Pressure and AI Demand Spillover Converge - UMC: Selective Price Hikes in 2H26, Broader Adjustments Possible in 2027; Singapore Expansion Accelerates - Micron: Market Cap Exceeds USD 1 Trillion, HBM4 Ramping Faster - Samsung Electronics: May Strike Risk Could Disrupt Supply; HBM4E Samples to Be Produced This Month - SK Hynix: HBM Hybrid Bonding Verification Complete, 2026 Capacity Sold Out - Nanya: DRAM Shortage Through End of 2027, Customized AI Memory Already Generating Revenue - Broadcom: 9500 Series Prices Drop on Large Shipments, 9600 Series Still Tight - NVIDIA: May GPU Demand Diverges, Server CPU Shortage Persists - DIODES: Lead Times Extend to One Year, Structural Shortage Unresolved in Near Term - CECport: Q1 Earnings Signal Start of Distribution Super-Cycle - TSMC: 3nm Price Hike Reflects AI Compute Demand Far Exceeding Expectations - SMIC / Huahong Grace: Mature Nodes Benefit from “AI Spillover”

Category	Trend
End-market (Artificial Intelligence)	- Microsoft's Biggest India Data Center on Track for Mid-2026 - Google and Blackstone Launch AI Cloud Venture - Alibaba to Exceed RMB 380B AI Investment Plan - SoftBank to Invest €45B in France AI Data Centers
End-market (Automotive)	- BYD in Talks for European Plant Expansion - Stellantis to Invest Over €1 Billion in Mulhouse EV Production - Toyota Sales Drop for Third Consecutive Month - European BEV Sales Continue Growing in Early 2026
End-market (Healthcare)	- Philips Reports Stronger Sales, Margins and Order Growth - Siemens Healthineers Cuts Outlook on China Diagnostics Weakness - Jardine Matheson to Acquire I-MED Radiolog - Roche to Acquire PathAI for AI Diagnostics
End-market (Industrial)	- Foxconn Raises CapEx for AI Server Manufacturing - ABB Invests US$200 Million in European Grid Equipment - Schneider Electric Sees India Data Center Business Outpacing Core Growth - Siemens Orders Rise More Than Expected
End-market (Robotics)	- Humanoid to Deploy Up to 2,000 Robots at Schaeffler Plants Humanoid - Schaeffler Targets Large Humanoid Robotics Order Book - Japan Airlines Starts Unitree-Based Humanoid Robot Trial - AgiBot Scales Humanoid Robot Production AgiBot
Memory Market Trends	- DDR4: Demand Recovery Drives Spot Price Increases; Micron's New Line to Boost Supply by Year-End - DDR5: Tight Supply and Vendor Inventory Controls Keep Server DDR5 Prices Rising Through June - LPDDR: LPDDR4X and LPDDR5X Prices Expected to Rise Sharply in Q2 - HBM: Strong Demand and Limited Capacity Continue to Push Prices Higher; Shortages May Persist Until Q2 2027 - NAND Flash: MLC Production Cuts Reduce Supply and Drive Price Increases - SSD: Contract Prices Rise While Spot Prices Soften, Showing Market Divergence - HDD: Consumer HDD Demand Remains Weak; Enterprise HDD Market Stays Stable

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Macro Environment Updates

1. Macro Environment

1.1 Industry Policy

1.1.1 U.S.: Trump Visits China with Semiconductor Executive Team, H200 Chip Exports to China Moderately Relaxed

From May 13 to 15, U.S. President Trump visited China for the first time in nine years, accompanied by a business delegation that included CEOs of major semiconductor companies such as Nvidia, Qualcomm, and Micron Technology. Nvidia CEO Jensen Huang, invited personally by Trump at the last minute before departure, drew significant market attention. During the visit, the U.S. side made the export of H200 high-end AI chips to China a key negotiation topic. The export license for H200 had been approved by the U.S. Department of Commerce as early as December 2025, but Chinese authorities have so far not approved domestic companies to procure them. Whether China's purchasing stance will change after the meeting and when actual deliveries will take place remain to be seen. After the visit, U.S. Trade Representative Greer publicly stated that chip export controls were not a major topic in the bilateral talks, deliberately downplaying any signal of relaxed controls to avoid China interpreting H200 procurement as a broader U.S. concession. The visit underscores that semiconductors have become a focal point of U.S.-China strategic competition. U.S. AI chip restrictions on China have shifted from a blanket ban to a more flexible case-by-case approval for select high-end chips, but the overall control framework remains largely unchanged.

1.1.2 EU: Approves EUR 288 Million German State Aid, Boosts EUV Optical Modules and Silicon Carbide Materials

On May 20, the European Commission formally approved EUR 288 million in German state aid to support the construction of two new plants in the semiconductor supply chain. Of this, EUR 222 million will go to Carl Zeiss to build an EUV optical module production facility in Baden-Württemberg – these components are core to ASML's next-generation EUV lithography systems – and EUR 66 million to Zadient Materials for an ultra-high-purity silicon carbide source material plant in Saxony-Anhalt, using an innovative circular-system technology. This is a concrete case of the EU promoting localization of critical materials and equipment under the EU Chips Act. The Zeiss project directly serves the world's most advanced EUV lithography supply chain, while silicon carbide is the core foundation for third-generation semiconductor power devices. The approval of this aid shows that the EU is moving from "legislative declaration" to "project delivery," accelerating the build-up of self-controllable capabilities in key upstream semiconductor segments to reduce dependence on Asian supply chains.

1.1.3 Japan: Removes JPY 30 Billion Investment Threshold, Expands Subsidies for Legacy Chips

Japan's Ministry of Economy, Trade and Industry will revise semiconductor subsidy conditions in May, removing the previous minimum investment threshold of JPY 30 billion (approx. USD 190 million) so that smaller legacy chip manufacturers can also receive support, with a focus on analog semiconductors and microcontrollers (MCUs). The global chip shortage in 2021 forced automakers like Toyota to suspend production, highlighting the economic security risks of over-reliance on overseas supply. Conditions for subsidies include: increasing domestic production capacity by more than 30%, or transferring more than 30% of overseas production to Japan; prioritizing domestic supply during shortages; and implementing measures to prevent technology leakage. Japan has already provided about JPY 1.2 trillion in subsidies to TSMC's Kumamoto plant and about JPY 2.3 trillion to Rapidus. With the rise of physical AI (AI-controlled robots and vehicles), demand for legacy chips in automobiles and robotics is surging. This lowering of the threshold aims to encourage smaller manufacturers to enter the market, shifting from a "focus on cutting-edge" to a "balance between cutting-edge and mature nodes," building a more resilient semiconductor supply system to support the government's goal of achieving JPY 40 trillion in domestic semiconductor sales by 2040.

1.1.4 South Korea: May Semiconductor Exports Surge 169.4% YoY, Hitting Record High on AI Demand

According to data released by South Korea's Ministry of Trade, Industry and Energy on June 1, the country's total exports in May reached USD 87.75 billion, up 53.2% YoY, a record monthly high. Semiconductor exports jumped 169.4% YoY to USD 37.16 billion, exceeding USD 30 billion for three consecutive months and also hitting a record high. By segment, DRAM exports grew 369.8% and NAND flash exports rose 206.8%. Driven by AI server demand for SSDs, computer exports soared 290.7% to USD 4.18 billion. In addition, display exports increased 9.4% and wireless communication equipment exports grew 12.6%. By region, exports to China rose 80.9% to USD 18.9 billion, the seventh consecutive month of growth; exports to the U.S. increased 59.1% to USD 15.97 billion; and exports to ASEAN reached a new high of USD 15.85 billion. Driven by increased AI investment by major U.S. tech companies, memory chip prices remain high, sustaining strong semiconductor export growth. The cumulative trade surplus from January to May reached USD 101.91 billion, exceeding the full-year total of last year. Notably, auto exports fell 5.9% due to fewer working days and parts supply disruptions, indicating that South Korea's export growth is heavily dependent on the semiconductor sector alone, and structural concentration risk remains a concern.

1.1.5 Taiwan, China: Q1 GDP Up 13.69%, 39-Year High, While Semiconductor Strength Masks Broad Industrial Decline

According to data released by the Directorate-General of Budget, Accounting and Statistics (DGBAS) of China's Taiwan region, the economic growth rate in the first quarter of 2026 reached 13.69%, the highest quarterly figure in nearly 39 years since the third quarter of 1987. Export performance was particularly strong: the year-on-year growth rate of merchandise exports in U.S. dollar terms surged to 51.10%, with electronic components and information/audio-video products accounting for 78.5% of total exports. However, behind the striking data lies a serious "K-shaped" structural imbalance. Huang Qiyuan, President of Lan Tao Asia (China's Taiwan), pointed out that the current economic boom is essentially "one Taiwan, two worlds": AI and semiconductors are driving up stocks and exports, but the workforce in these sectors accounts for only about 15% of the island's employment market. The remaining 85% of workers are concentrated in traditional manufacturing, services, small and medium-sized enterprises (SMEs), and agriculture, with most traditional industries under recessionary pressure. Nearly 90% of non-tech stocks are weak, more than half of workers earn below the median wage, and a large number of service-sector workers earn less than NTD 30,000 per month (approx. USD 930). Huang Qiyuan urged that if China's Taiwan fails to address the K-shaped trend of industry and the economy, serious social problems may erupt. Engaging with the mainland's recently announced 10 measures benefiting Taiwan (precisely targeting traditional industries, services, SMEs, and agriculture) could provide an opportunity to remedy the island's industrial structural imbalance.

1.2 Economic Indicators

1.2.1 Global Manufacturing PMI in April Rises to 52.6, Major Economies Expand Faster but Cost and Supply Chain Pressures Intensify

Global manufacturing continued to expand in April 2026, but cost and supply chain disruptions from the Middle East conflict intensified significantly. The J.P. Morgan Global Manufacturing PMI came in at 52.6, up 1.3 percentage points from March, hitting a four-year high and remaining above the 50-mark for the ninth straight month. Output and new orders accelerated, though partly driven by customers placing orders early to avoid price hikes and supply disruptions. Supplier delivery times worsened to their longest since August 2022, and input cost inflation expanded notably. By economy: the U.S. PMI rose to 54.5 (highest since May 2022), with output and new orders growing at the fastest pace in four years, but exports fell for 11 consecutive months and employment contracted for the first time in nine months due to cost pressure; the Eurozone PMI rose to 52.2 (near four-year high), with all eight major member countries returning to expansion, though input prices neared four-year highs and output price inflation was the largest since January 2023; Japan's PMI surged to 55.1 (highest since January 2022), with output growth the fastest since February 2014, driven by AI demand and preemptive buying, but supplier delivery times worsened to a 15-year low; China's PMI rose to 52.2 (strongest since December 2020), with output growth the fastest in nearly two years and new orders growing at the second-fastest pace in five years, while employment stabilized and business confidence improved; South Korea's PMI rose to 53.6 (highest since February 2022), with new orders and output both accelerating, but input price inflation hit a record high since the survey began, and output prices also hit a new high; India's PMI rose to 54.7, with export order growth at a seven-month high, though input cost inflation was the largest in 44 months and output price inflation the highest in six months. Overall, AI-related demand provides key support for manufacturing, but supply chain disruptions and rising costs from the Middle East conflict are becoming common challenges for global manufacturing.

Global Manufacturing by Region PMI

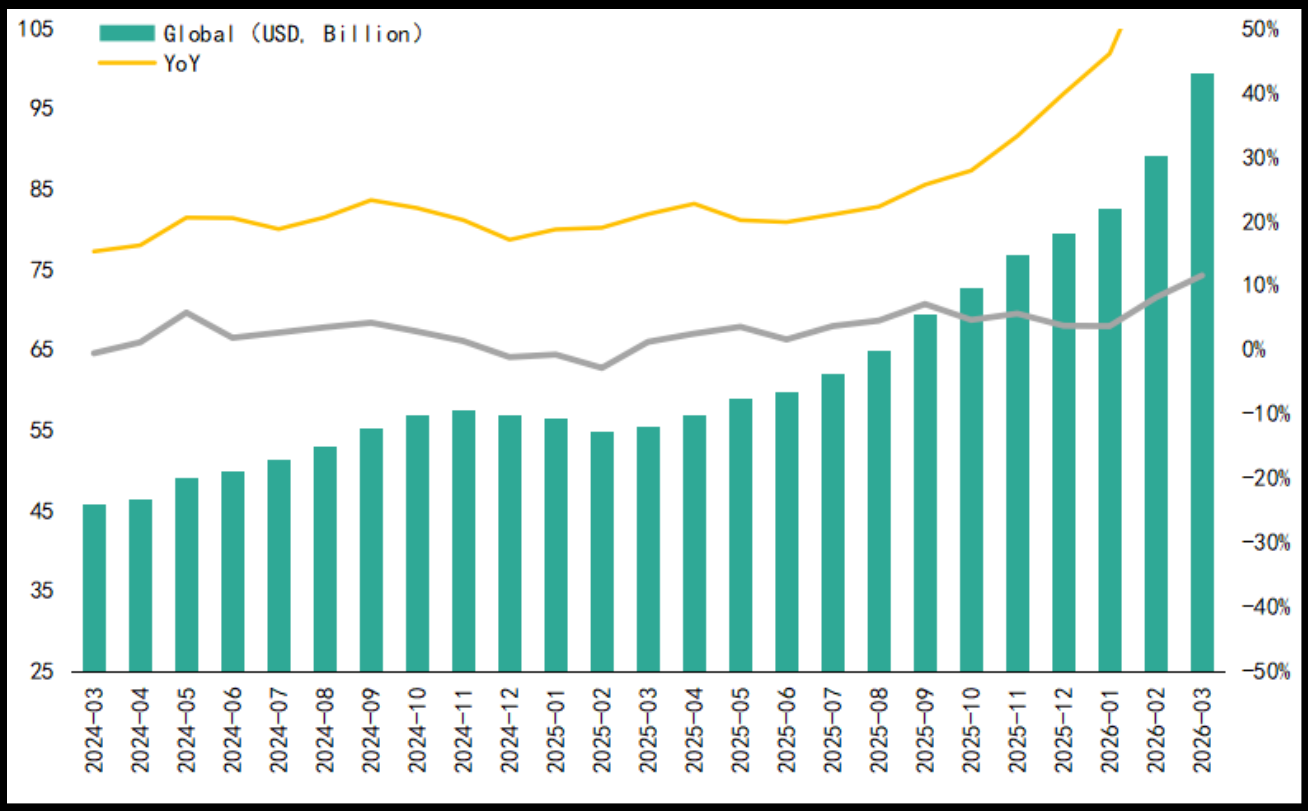
Period	Global	China	Japan	Korea	India	Americas	Eurozone
2023-11	49.30	49.40	48.30	50.00	56.00	46.70	44.20
2023-12	49.00	49.00	47.90	49.90	54.90	47.40	44.40
2024-01	50.00	49.20	48.00	51.20	56.50	49.10	46.60
2024-02	50.30	49.10	47.20	50.70	56.90	47.80	46.50
2024-03	50.60	50.80	48.20	49.80	59.10	50.30	46.10
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	50.80	51.60	52.60	53.90	52.30	51.60
2026-04	52.60	52.20	55.10	53.60	54.70	54.50	52.20

Source : Wind

1.2.2 Global Semiconductor Sales Jump 79.2% YoY in March, Q1 Climbs 25% QoQ, on Track to Surpass USD 1 Trillion in 2026

On May 4, 2026, the Semiconductor Industry Association (SIA) released data showing that global semiconductor sales in Q1 2026 reached USD 298.5 billion, up 25% from Q4 2025. March sales were USD 99.5 billion, up 11.5% from February's USD 89.5 billion and up 79.2% from March 2025's USD 55.5 billion. By region for March on a YoY basis: Asia Pacific/Other led with a 108.5% increase, followed by the Americas (+83.1%), China (+74.8%), Europe (+46.5%), and Japan (+7.4%). On a QoQ basis: the Americas (+13.3%), China (+12.7%), Asia Pacific/Other (+9.8%), Europe (+8.4%), and Japan (+7.1%). SIA President and CEO John Neuffer stated that global chip sales are steadily progressing toward the USD 1 trillion target for 2026. The sharp Q1 increase over Q4 2025, together with strong growth in Asia Pacific, the Americas, and China, underscores broad demand for semiconductors and downstream technology products.

Global Semiconductor Sales (Billion US Dollars)

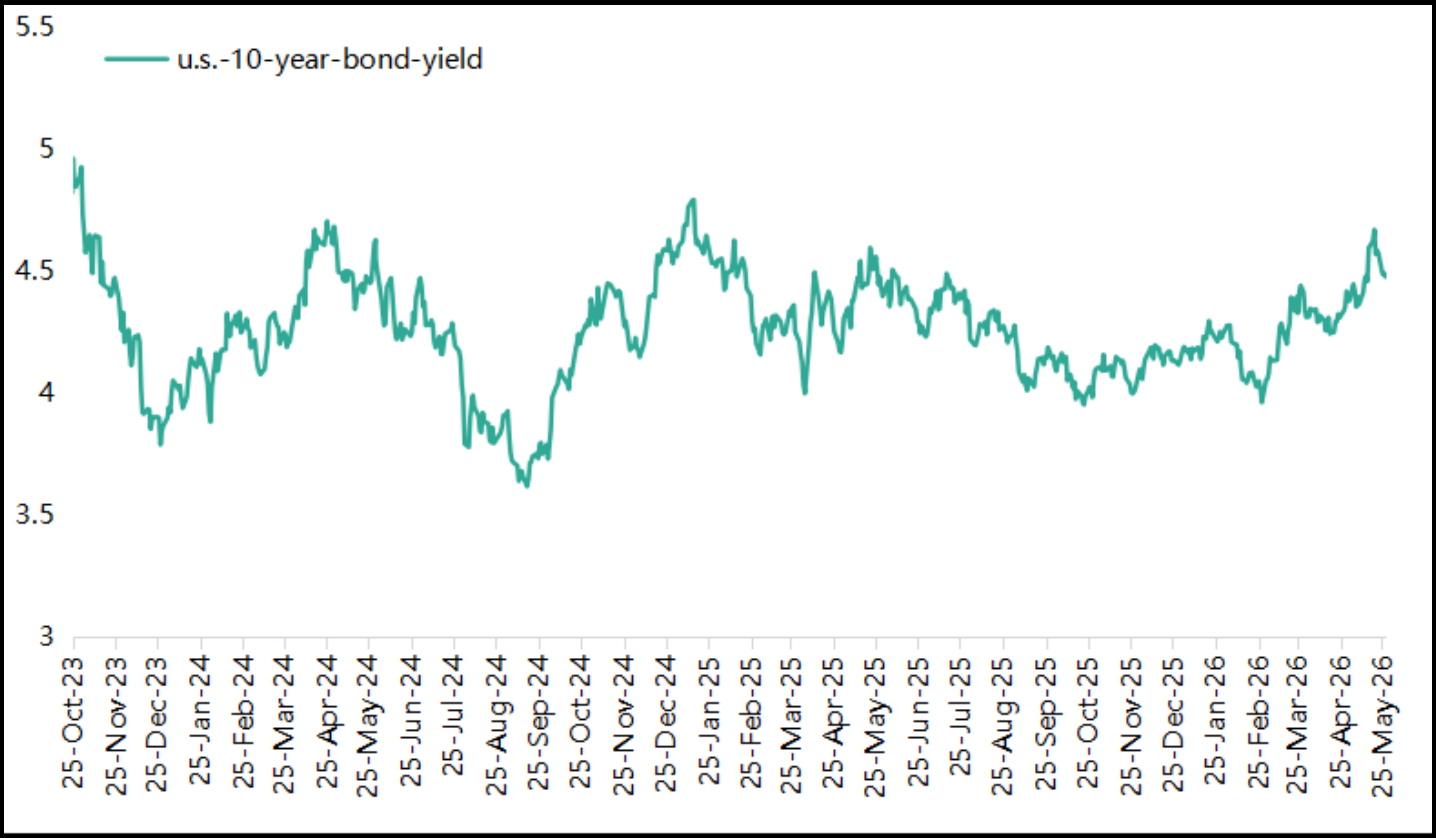


Source：SIA

1.2.3 U.S. 10-Year Treasury Yield Fluctuates Higher in May, Inflation Expectations and Policy Signals Drive Yield Increase

In May 2026, the U.S. 10-year Treasury yield generally moved higher with fluctuations. The yield closed at 4.378% on May 1 and at 4.477% on May 27, rising about 9.9 basis points over the month. The intra-month low was 4.342% on May 1, and the high was 4.687% on May 19 (closing high of 4.669% on May 19), trading in a range of roughly 4.34%-4.69%. In early May, yields moved narrowly between 4.35% and 4.45%. A rapid increase occurred from May 12 to 19, with yields climbing from 4.412% to 4.669%, up about 25.7 basis points over eight trading days. Yields then pulled back from May 20 to 27, falling from 4.57% to 4.477%, partially retracing the gains. Key drivers included: resilient U.S. economic data reinforcing expectations that the Fed would keep rates high; a mid-May rebound in crude oil prices lifting inflation expectations; and hawkish signals from several Fed officials during the month, pushing market expectations for the timing of rate cuts further into the year. The modest pullback at month-end reflected a correction of excessive pricing. Overall, the 10-year Treasury yield in May was higher than in April, putting some valuation pressure on growth assets such as semiconductors.

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

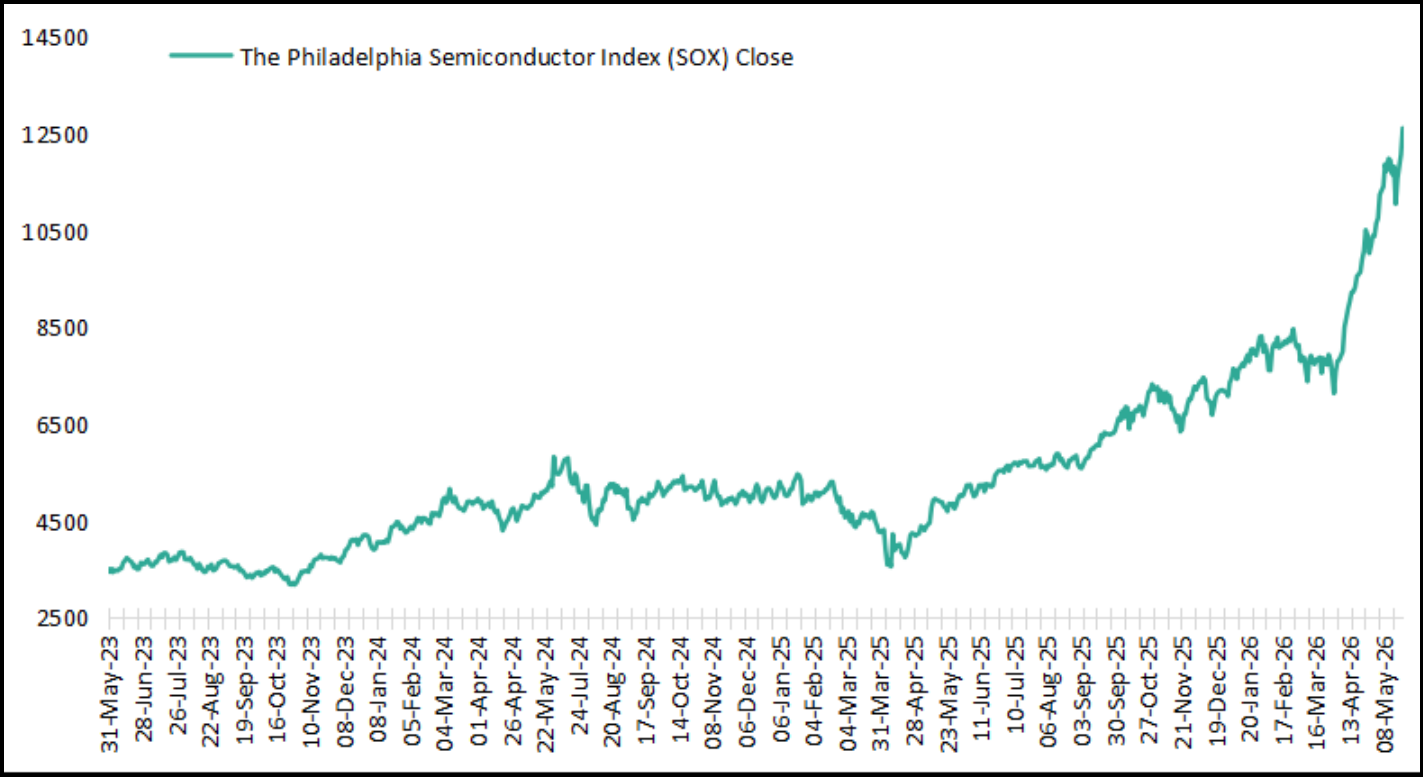


Source：Investing

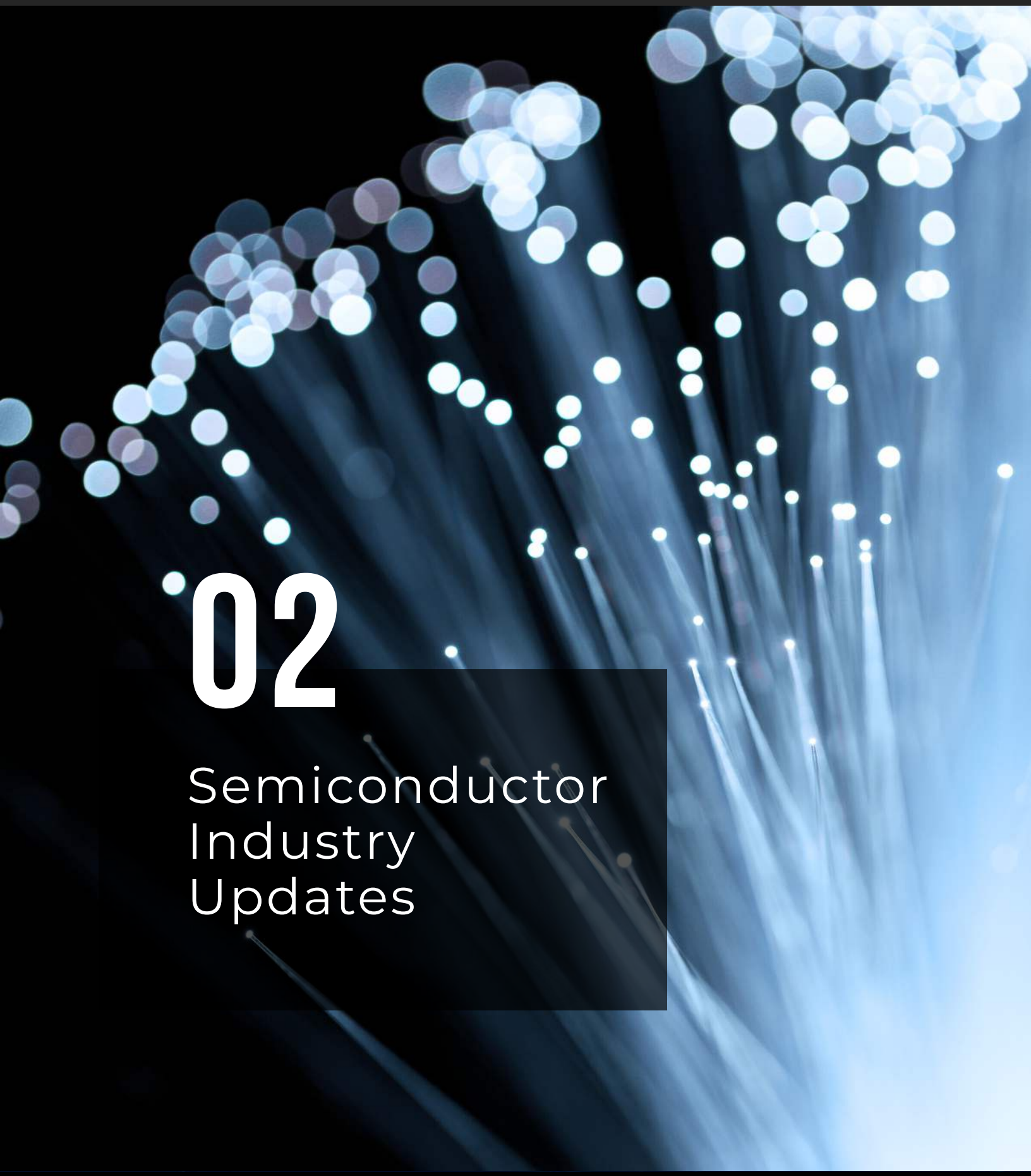
1.2.4 Philadelphia Semiconductor Index (SOX) Trend in May: Breaks 12,000 and Extends Strength, Mid-Month Volatility Rises but AI Theme Remains Intact

In May 2026, the Philadelphia Semiconductor Index (SOX) continued its upward trend, starting from 10,387.84 at end-April and closing at 12,616.63 on May 26, a monthly gain of about 21.4%. After breaking 10,000 in April, the index further solidified its position above 12,000. The index accelerated early in the month, hitting an intraday high of 12,108.67 on May 11, then experienced a technical pullback, closing at 11,741.47 on May 12 and briefly dipping to 11,522.27 on May 15, giving back some gains. In the second half of the month, the index resumed its advance, closing at 12,070.17 on May 22 and reaching a record closing high of 12,616.63 on May 26. Monthly volatility increased significantly with more intense long-short battles, but the overall uptrend remained intact. The core driver of this rally continues to be sustained outperformance of AI computing demand: positive catalysts include U.S. approval of Nvidia H200 chip exports to China (pending Chinese procurement clearance), smooth progress on TSMC's 2nm process, and full order books for global AI servers. Meanwhile, the U.S. 10-year Treasury yield fluctuated in the 4.3%-4.5% range, not significantly suppressing high-valuation tech stocks. Correction pressure built up after the rapid rise was partially released mid-month, but with multi-faceted support from AI demand, advanced-node progress, and inventory replenishment, the global semiconductor industry remains on an upward cycle. Markets should monitor potential impacts on the index from future Fed policy signals and developments in U.S.-China semiconductor competition.

The Philadelphia Semiconductor Index (SOX)



Source : MacroMicro



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Semiconductor Industry Updates

Semiconductor Industry Overview

Manufacturer	Updates	Key Data	Trend & Impact (Incl. Models)
SIA	Releases Q1 Global Semiconductor Sales Data, Hitting Record Quarterly High	Q1 sales at USD 298.5 billion (+25% QoQ); March monthly sales at USD 99.5 billion (+79.2% YoY)	MOS memory +236.4% YoY, logic chips +40.1%, analog chips +14.9%; 2026 global sales on track to exceed USD 1 trillion for the first time
INFINEON	Announces Second 2026 Price Hike Effective July 1, Covering Select Power Semiconductor Products	Follows a first round in April; AI demand continues to push power device prices higher	Includes IGBTs, MOSFETs, solid-state transformers (SSTs); AI server power architectures shifting to HVDC, driving demand for high-voltage MOSFETs and IGBTs
Texas Instruments (TI)	Following a price hike on April 1, plans a second round of increases in 2026 effective July 1; Q1 data center revenue +90% YoY	First round: 15%–85% increases; second round covers PMICs, MOSFETs, etc.	Includes digital isolators (ISO7741), gate drivers (UCC21520), PMICs (TPS series). AI server demand is now spreading from GPUs to analog and power management chips
STMicroelectronics (ST)	Following a first round of price hikes on April 26, issued a second increase notice on May 28, effective June 28	Second round targets products not adjusted previously, with broader scope	Covers STM32-series MCUs, power MOSFETs (STP series), IGBTs, and SiC power devices (SCT series). Two price adjustments in four months reflect a recovery in automotive and industrial demand, coupled with spillover from AI demand
UMC	Shareholder Meeting on May 28: Selective Price Hikes in 2H26, Broader Price Negotiations in 2027	New Singapore fab: 12k wpm capacity (expandable to 18k wpm), mass production in 2027; silicon interposer capacity doubling from 3k to 6k wpm	Price hikes mainly for new orders, new processes, and new capacity; focus on 22/28nm and specialty processes. AI and data centers driving mature-node demand; foundry price hike trend spreading from 8-inch to 12-inch

Semiconductor Industry Overview

Manufacturer	Updates	Key Data	Trend & Impact (Incl. Models)
MICRON	Stock Surges Over 19% on May 26, Market Cap Exceeds USD 1 Trillion; Completes Tongluo Fab Acquisition	Market cap at USD 1.01–1.023 trillion; UBS raises target price to USD 1,625	HBM4 capacity ramps twice as fast as HBM3E; Tongluo fab expected to contribute >10% of global capacity by 2027; enterprise SSDs and DDR5 memory module contract prices continue to rise
SAMSUNG	Union Announces General Strike from May 21 to June 7; Plans to Produce First HBM4E Engineering Samples in May	If strike materializes, estimated 3%–4% disruption in global DRAM supply and 2%–3% in NAND supply	Targeting Nvidia's Vera Rubin Ultra platform; CXL memory system "Pangea v2" delivers 10.2x performance improvement; 2nm yield at ~55%
SK HYNIX	Confirms in May Completion of 12-High HBM Hybrid Bonding Verification; 2026 HBM Capacity Fully Sold Out	Has ordered integrated hybrid bonding systems (approx. KRW 20 billion / USD 15.4 million); customers shifting to 3–5 year long-term agreements	Lays foundation for hybrid bonding in HBM4; capable of up to 16-high stacking based on HBM3E; DRAM and NAND prices continue upward trend
NANYA	Shareholder Meeting on May 21: DRAM Shortage Through End of 2027; Customized AI Memory Already Generating Revenue	New fab to begin mass production in 2H27, adding 30k wafers per month	UltraWIO memory offers higher bandwidth than JEDEC HBM standards, using wafer-to-wafer bonding; volume production in 1H27
BROADCOM	After May 1 Price Hike, 9500 Series Market Prices Drop, 9600 Series in Tight Supply	9560-8i < USD 850, 9560-16i < USD 1,700; 9600 series fully increased	9560-8i (ample supply via Huawei channel), 9560-16i (large arrivals), 9670-24i / 9660-16i (9600 series tight), 9361-8i 1G (discontinued for three years, still strong demand from legacy needs)
NVIDIA	May GPU Market: High-End Firm, Mid-to-Low End Weakening; Server CPU Shortage Persists	High-end Pro 6000 series in tight supply; mid-to-low end inventory rising	Stable supply: RTX A400 / A1000 / 2000 ADA / PRO 2000 / 4000 / 5000 48GB, DGX Spark 4TB; server CPU shortages: 6544Y, 6542Y, etc.

Semiconductor Industry Overview

Manufacturer	Updates	Key Data	Trend & Impact (Incl. Models)
DIODES	Lead Times in May Generally Extended to 48–52 Weeks, Some Up to One Year; Two Price Hikes in February and April Now Fully Effective	20%–30% increase across all product lines; driven by Nexperia crisis and surge in AI demand	Covers Schottky diodes (BAT54 series), MOSFETs (DMN series), logic ICs (74HC series), ESD protection (PESD series). Shortage expected to last at least through 2027
CECport	Releases Q1 2026 Earnings: Revenue RMB 14.448 billion (approx. USD 2.01 billion), Up 144% YoY; Recurring Net Profit Growth 146%	Prepayments up 261% YoY, inventory up 50% QoQ; Q1 growth fastest in distribution industry	Distribution, as a semiconductor "barometer," is the first to recover, pointing to accelerating performance for upstream fabs in Q2/Q3 2026; driven by "AI + memory" dual engines, spot orders showing clear benefits
TSMC	Plans to Raise 3nm Process Prices in 2H26, Up to 15%, with Another 5%–10% Possible in 2027	3nm monthly capacity to increase from 130k to 160k–175k wafers (Q2 2026); 70.4% global foundry market share in Q4 2025	AI chips (NVIDIA GPUs, Broadcom/Marvell ASICs) and cloud self-developed chips accelerating adoption of 3nm, keeping capacity tight. 2nm still in early yield ramp-up; 3nm remains the most stable node for AI. Price hikes to address overseas expansion and depreciation pressures
SMIC Huahong Grace	Capacity Utilization Soars on AI Demand, Leading to Price Hikes for Tight-Supply Categories; Huahong Expected to Further Increase 12-Inch Product Prices in 2026	SMIC's Q1 2026 gross margin improved QoQ, with Q2 2026 gross margin guided at 20%–22%; capacity utilization since May nearly doubled from Q3 2025; Huahong's 12-inch price increase clearly expected	Strong demand for AI-enabling chips; overseas AI capacity crowding out advanced nodes, while consumer electronics/IoT orders return to China's mature nodes. SMIC fully acquires SMIC North (RMB 40.6 billion / approx. USD 5.64 billion); Huahong integrates Huali Micro (RMB 8.268 billion / approx. USD 1.15 billion). Beneficiaries: PMICs, MCUs, BCD power chips

2.1 Manufacturer Dynamics In-Depth Analysis

2.1.1 Global Semiconductor Market: Q1 Sales Hit Record USD 298.5 Billion, March Up 79.2% YoY

Data released in May by the Semiconductor Industry Association (SIA) shows that global semiconductor sales in Q1 2026 reached USD 298.5 billion, up 25% QoQ, a quarterly record. March sales alone were USD 99.5 billion, up 79.2% YoY. By category: MOS memory +236.4% YoY, logic chips +40.1%, MOS microcomponents +18.8%, analog chips +14.9%. By region: Asia Pacific/Other +108.5% YoY, Americas +83.1%, China +74.8%, Europe +46.5%. SIA President and CEO John Neuffer stated that global semiconductor sales are on track to exceed the USD 1 trillion mark for the first time in 2026.

2.1.2 Infineon: Second Price Hike of the Year Effective July 1, AI Drives Structural Shortage in Power Semiconductors

According to TechNews and the Commercial Times reported on May 27, Infineon notified customers and partners on May 26 of a price adjustment on select products effective July 1, 2026 – its second increase of the year following the first round in April 2026. Infineon stated that the global semiconductor supply chain continues to face rising cost pressures, with geopolitical tensions driving up costs across energy, raw materials, transportation, and labor. Meanwhile, demand across product lines is growing much faster than anticipated just months ago. To maintain stable supply, Infineon is accelerating investment in capacity expansion. Infineon specifically noted that traditional transformers, which use large amounts of copper and other raw materials, face rising cost and lead-time pressure, while newer technologies such as solid-state transformers (SSTs), which consume fewer raw materials, are becoming more attractive alternatives amid intensifying competition for AI and infrastructure demand. AI compute expansion has now fully transmitted from GPUs to power semiconductors, and Infineon's second price hike confirms this structural trend.

2.1.3 Texas Instruments: Following April 1 Price Hike, Second Round Set for July 1

After implementing a first round of broad price increases (15%–85%) on April 1, TI plans a second round effective July 1, mainly covering PMICs, MOSFETs, and other products. Following the first round, spot quotes for core industrial and automotive products rose 30%–60%, with lead times extending to 16–26 weeks. Q1 revenue came in at USD 4.825 billion (+19%), while data center revenue surged 90% YoY, indicating that AI server demand is now spreading from GPUs to analog chips. The two price hikes, less than three months apart, reflect the dual drivers of rising cost pressures and AI demand spillover.

2.1.4 STMicroelectronics: Second Price Hike in Three Months, Cost Pressure and AI Demand Spillover Converge

On May 28, ST issued a global customer notice announcing another price increase on select products effective June 28, 2026 – its second adjustment of the year following the first round on April 26, with only about two months between the two. ST stated in the letter that operating costs such as raw materials, transportation, and labor continue to rise, and the previous price adjustment no longer covers the incremental costs. Therefore, it decided to expand the price increase scope, focusing on products not adjusted previously, covering core categories such as STM32-series MCUs, power MOSFETs (STP series), IGBTs, and SiC power devices (SCT series). The core driver of this price hike has shifted from pure cost pass-through to a dual-driver model of "cost push + AI demand spillover" – AI is now spreading from GPUs and HBM to power management and power conversion. The Nvidia GB300 platform and the adoption of high-voltage DC (HVDC) architectures will further drive demand for high-voltage MOSFETs and IGBTs. Meanwhile, ST continues to make heavy-asset investments in automotive-grade SiC, and price hikes have become an important means of protecting margins and cash flow amid massive capex. On the demand side, automotive electronics, industrial control, and AI power supplies have seen clear recoveries. ST’s Q1 2026 revenue grew 23.0% YoY, beating expectations, and the downstream replenishment cycle has begun. For the China market, distribution prices for STM32, STP, SCT and other series may see another round of increases and longer lead times. However, price hikes by international majors also open a window of opportunity for China-made analog and power device companies to gain market share.

2.1.5 UMC: Selective Price Hikes in 2H26, Broader Adjustments Possible in 2027; Singapore Expansion Accelerates

According to reports from Liberty Times, MoneyDJ, TechNews, Commercial Times, and CNA on May 28, UMC disclosed its latest pricing strategy and expansion plans at its shareholder meeting that day. UMC CFO Liu Qidong stated that the company plans selective price hikes in the second half of 2026, targeting new orders, new processes, and newly added capacity, while broader price negotiations are expected in 2027, with potentially larger adjustments. UMC noted that recent rises in raw material costs and higher expansion costs in Singapore (compared to Taiwan) are key factors driving the price adjustments. Existing long-term contract prices will remain unchanged.

On capacity expansion, UMC is accelerating construction of its new Singapore fab. The fab focuses on 22/28nm and select specialty processes, with planned monthly capacity of about 12k wafers, expandable to 18k wafers. Ramp-up is expected to begin in 2026, but mass production may be postponed to 2027. In addition, UMC is doubling its silicon interposer monthly capacity from 3k to 6k wafers to better meet customer demand in advanced packaging. The company is also evaluating silicon photonics, advanced nodes, and advanced packaging as part of its Singapore expansion roadmap.

UMC's price hike plans echo rumors of TSMC raising 3nm prices further, indicating that the foundry industry is entering a broad pricing up-cycle. TrendForce previously forecast a 2.4% contraction in global 8-inch capacity in 2026, while demand for 12-inch mature nodes (22/28/40nm) – driven by AI power management, IoT, and automotive electronics – keeps supply tight. UMC's selective pricing strategy reflects both cost pressures and its pricing power in mature-node niches.

2.1.6 Micron: Market Cap Exceeds USD 1 Trillion, HBM4 Ramping Faster

On May 26, Micron's stock surged over 19% to close at USD 895.88, pushing its market cap above the USD 1 trillion mark, making it the third semiconductor company (after TSMC and Nvidia) to join the "trillion-dollar club." UBS analyst Timothy Arcuri raised his target price from USD 535 to USD 1,625 – more than a threefold increase. Micron previously completed its USD 1.8 billion acquisition of Powerchip's Tongluo P5 fab. TrendForce estimates Phase 1 will contribute capacity in 2H27, equivalent to more than 10% of Micron's global capacity in Q4 2026. On the technology front, Micron's HBM4 capacity is ramping twice as fast as HBM3E; its 1-gamma process is expected to become the main production driver by mid-2026; and HBM4E development is progressing well, with a ramp-up expected in 2027. Memory buyers are increasingly signing 3- to 5-year long-term contracts.

2.1.7 Samsung Electronics: May Strike Risk Could Disrupt Supply; HBM4E Samples to Be Produced This Month

According to reports from South Korea's Newsis and Chosun Ilbo, Samsung Electronics' labor union has announced a general strike from May 21 to June 7. KB Securities analyst Kim Dong-won estimates that if the strike is fully implemented, global DRAM supply could be disrupted by 3%–4% and NAND supply by 2%–3%. Samsung is currently directing 90% of its new wafer capacity toward HBM and server DRAM, and has officially discontinued LPDDR4/4X. On advanced technology, Samsung plans to produce its first HBM4E engineering samples in May, targeting Nvidia's Vera Rubin Ultra accelerator platform. Its CXL memory system "Pangea v2" delivers a 10.2x performance improvement over the previous generation. 2nm yield is around 55%. The strike risk, combined with the already confirmed 30% Q2 contract price increase for DRAM, will further tighten memory chip supply.

2.1.8 SK Hynix: HBM Hybrid Bonding Verification Complete, 2026 Capacity Sold Out

According to The Elec reported on April 29 (the news of this technical verification continued to impact the market in May), SK Hynix has completed verification of 12-high HBM hybrid bonding, is raising mass-production yield, and has ordered an integrated hybrid bonding system (approx. KRW 20 billion / USD 15.4 million) co-developed by Applied Materials and Besi, laying the foundation for introducing hybrid bonding in HBM4. The company also has the capability to stack up to 16-high based on HBM3E. On capacity, SK Hynix's 2026 HBM capacity is already sold out, with customer demand far exceeding supply, and customers are shifting to 3- to 5-year long-term agreements. Q1 earnings showed revenue of KRW 52.58 trillion (approx. USD 39.2 billion) and a record 72% operating margin. SK Group Chairman Chey Tae-won stated that the AI-driven shortage could last until 2030, with a potential supply gap of over 20%.

2.1.9 Nanya: DRAM Shortage Through End of 2027, Customized AI Memory Already Generating Revenue

On May 21, Nanya Technology held its 2026 shareholder meeting. President Lee Pei-ing stated that the DRAM shortage "will remain tight at least through the end of next year," and multiple customers are proactively requesting long-term contracts of more than two to three years. Nanya is not focusing on traditional standard HBM but on customized Ultra-Wide I/O (UltraWIO) memory, which offers higher bandwidth than JEDEC HBM specifications and uses wafer-to-wafer bonding technology. This product has already begun generating modest revenue and is expected to reach volume production in 1H27, with more than one partner involved. The new fab expansion is expected to start equipment installation in Q1 2027 and enter mass production in 2H27, adding about 30k wafers per month, with overall capacity potentially increasing by 80%–100% over the next three years.

2.1.10 Broadcom: 9500 Series Prices Drop on Large Shipments, 9600 Series Still Tight

Since Broadcom's official price hike on May 1 (overall increase of more than 10%), the market has shown diverging trends. Driven by increased supply, market transaction prices for key 9500-series models have fallen: the 9560-8i, recently well-supplied via Huawei channels, is priced below USD 850; the 9560-16i, seeing large ongoing shipments through Q3, is priced below USD 1,700. Meanwhile, order prices for the entire 9600 series (9670-24i, 9660-16i, etc.) have been raised in line with the original factory adjustment. This series was in long-term shortage previously; though small volumes have now entered the market, they move quickly and supply remains tight. Notably, the 9361-8i 1G, discontinued for more than three years, continues to see strong essential demand from both domestic and overseas end markets due to its stable compatibility.

2.1.11 NVIDIA: May GPU Demand Diverges, Server CPU Shortage Persists

The GPU market in May showed clear divergence. High-end graphics cards (e.g., Pro 6000 series), supported by professional use cases such as AI model training and film rendering, saw stable demand, firm prices, and relatively tight supply. Mid-to-low-end cards (e.g., Pro 4000/4500), affected by weaker PC and routine design demand, saw price corrections and rising channel inventories. The following models are currently well-supplied with stable availability: RTX A400, RTX A1000, RTX 2000 ADA, RTX PRO 2000, RTX PRO 4000, RTX PRO 5000 48GB, DGX Spark 4TB. On server CPUs, demand for 5th and 6th generation is strongest, with models such as 6544Y, 6542Y, 6526Y, 6438N, 6767P, and 6761P in severe shortage; lead times for some high-end models extend to six months. On pricing, Q2 prices were raised across the board, and official prices continued to rise in May.

2.1.12 DIODES: Lead Times Extend to One Year, Structural Shortage Unresolved in Near Term

According to industry media such as SemiMedia, DIODES Incorporated implemented a roughly 20% price increase across all product lines in early February 2026, followed by another adjustment on certain product series effective April 1, with new prices applying to both new orders and existing backlog. Per supply chain sources, lead times for some DIODES products have extended significantly to about 52 weeks. This shortage is driven by two structural factors. First, the Nexperia capacity crisis. The Dutch government imposed mandatory controls on Nexperia in September 2025 under the 1952 Supplies of Goods Act, and China subsequently imposed an export ban on Nexperia's China plants, restricting about 50% of its packaging and testing capacity and disrupting supply to European customers. According to Handelsblatt, Nexperia supplies 49% of electronic components to the European automotive industry. Affected downstream OEMs are permanently dropping the brand and turning to DIODES as their primary alternative. Second, explosive demand from AI servers. Per TrendForce and multiple industry reports, as AI data centers accelerate construction, AI server power architectures are shifting to HVDC, driving a surge in demand for power semiconductors such as MOSFETs and power management ICs. This has significantly squeezed 8-inch mature process capacity, pushing global 8-inch wafer foundry average utilization to nearly 90% in 2026, with tight supply expected to persist in the near term. Under the dual pressures of diverted Nexperia orders and surging AI demand, DIODES' capacity is overwhelmed, and the supply-demand imbalance is expected to last at least through 2027. Affected models include Schottky diodes (BAT54 series), MOSFETs (DMN2990UDJ), logic ICs (74HC595), and ESD protection (PESD5V0S1BA).

2.1.13 CECport: Q1 Earnings Signal Start of Distribution Super-Cycle

China's distribution leader CECport released its Q1 2026 earnings report in May, showing revenue of RMB 144.48 billion (approx. USD 20.1 billion), up 144% YoY; recurring net profit growth of 146%, with profit quality at a record high. Prepayments jumped 261% YoY and inventory rose 50% QoQ, indicating the company is actively paying upstream to secure capacity and building inventory, reflecting strong confidence in future demand. Comparing six major distributors (domestic and international), average Q1 YoY growth exceeded 90%, further confirming the upward cycle. Based on historical cycle patterns, distributor growth leads upstream fabs by about two quarters, suggesting that core suppliers such as TI, NXP, and Infineon will see further earnings acceleration in Q2/Q3. Looking at CECport's revenue mix, the "AI + memory" dual-driver trend is clear, with price hikes for memory and AI server-related products set to continue.

2.1.14 TSMC: 3nm Price Hike Reflects AI Compute Demand Far Exceeding Expectations

TSMC's 3nm process was originally driven mainly by smartphone SoCs, but as AI servers enter a new upgrade cycle, customers such as NVIDIA, AMD, Google, and AWS are accelerating their migration of AI chips to 3nm. Additionally, cloud vendors developing their own ASICs (to reduce dependence on general-purpose GPUs) are further expanding wafer demand. The Fab 18 production line remains fully utilized; even with monthly capacity expanded from 130k to 160k–175k wafers, it still cannot meet customer orders on queue. The price hike is both a market result of supply-demand imbalance and a strategic move by TSMC to address depreciation pressures from overseas fab expansion (e.g., in Arizona, U.S.) while maintaining gross margins above 55%. With 2nm still in early yield ramp-up, 3nm will continue to be the most mature and cost-effective node for AI chips before 2nm mass production. The price increase trend is expected to last at least through 2H26 into 2027.

2.1.15 SMIC / Huahong Grace: Mature Nodes Benefit from “AI Spillover”

SMIC and Huahong Grace have recently seen capacity utilization surge for two direct reasons. First, AI servers and edge AI devices (ToF sensors, power management chips, robots, EVs) are driving explosive demand for mature-node supporting chips, including PMICs, MCUs (e.g., STM32 series), and BCD power chips. Second, overseas advanced fabs (TSMC, Samsung) are prioritizing capacity for high-margin AI advanced nodes, causing consumer electronics and IoT mature-node orders to spill over to mainland China. SMIC has raised prices on tight-supply categories, with gross margin expected to reach 20%–22% in Q2 2026; capacity utilization since May has nearly doubled from Q3 2025. Huahang Grace continued raising prices in 2025, and further increases are expected for its 12-inch product lines in 2026, with strong growth in MCUs, standalone flash, and BCD power chips.

This trend shows that mainland China’s mature-node capacity is playing an increasingly stronger role as a “safety cushion” in the global supply chain. At the same time, the two foundries are accelerating horizontal integration: SMIC has fully acquired SMIC North (RMB 40.6 billion / approx. USD 5.64 billion acquisition approved), and Huahong is integrating Huali Micro (RMB 8.268 billion / approx. USD 1.15 billion transaction in progress). The resulting scale effects will further consolidate their cost and capacity advantages in mature nodes.

03

Application Updates

3. Application Updates Overview

Category	Updates	Insight
Artificial Intelligence	Microsoft confirmed its largest India data center remains on track for mid-2026 operations as part of its continued AI and cloud infrastructure expansion strategy in the region.	Additional AI compute capacity is expected to increase demand for enterprise SSDs, DDR5 RDIMM, high-speed networking modules, power management ICs and data center power infrastructure.
Artificial Intelligence	Google and Blackstone announced a joint AI cloud infrastructure venture targeting approximately 500MW of data center capacity, backed by an initial US$5 billion investment.	Large-scale AI infrastructure deployment is expected to support procurement of AI servers, HBM, enterprise SSDs, liquid cooling systems, high-speed interconnect solutions and power modules.
Artificial Intelligence	Alibaba stated that its AI investment is expected to exceed the previously announced RMB380 billion commitment as cloud and AI demand continues to grow.	Continued AI infrastructure expansion may increase demand for AI servers, DDR5 memory, enterprise storage, networking equipment and power management components across China.
Artificial Intelligence	SoftBank unveiled plans to invest €45 billion over five years to build AI-focused data center capacity in France.	The project is expected to drive long-term demand for AI servers, enterprise SSDs, power distribution equipment, cooling infrastructure and grid-related electrical components.
Automotive	BYD is reportedly exploring underused European plants to support localized EV production.	Local EV production may increase demand for automotive MCUs, BMS ICs, power modules, sensors and vehicle connectivity components.
Automotive	Stellantis announced over €1 billion investment for next-generation EV production at Mulhouse, France.	Long-term EV production supports demand for power semiconductors, onboard chargers, battery management ICs, automotive memory and sensors.
Automotive	Toyota reported a third consecutive monthly sales decline, mainly affected by China and Middle East weakness.	Softer vehicle demand may slow short-term pull-in for automotive MCUs, infotainment components, sensors and memory in weaker regions.

Category	Update	Insight
Automotive	European BEV sales continued growing in early 2026, with BEVs driving most EV volume growth.	Higher BEV penetration supports demand for BMS, power modules, SiC devices, thermal sensors, charging components and automotive-grade memory.
Healthcare	Philips reported stronger sales, margins and order growth.	Stable healthcare equipment demand may support embedded processors, medical sensors, displays, storage devices and power management components.
Healthcare	Siemens Healthineers cut its outlook due to China diagnostics weakness.	Softer diagnostics demand may affect laboratory equipment electronics, diagnostic modules, sensors and related embedded systems.
Healthcare	Jardine Matheson agreed to acquire I-MED Radiology for around US$2.4 billion.	Imaging network expansion may support demand for medical workstations, storage servers, diagnostic displays and imaging electronics.
Healthcare	Roche agreed to acquire PathAI to strengthen AI-enabled diagnostics and digital pathology.	AI pathology adoption may increase demand for image processing hardware, medical servers, enterprise storage and digital diagnostic infrastructure.
Industrial	Foxconn plans around 30% higher capex to expand AI server manufacturing capacity.	AI server buildout supports demand for PCB, connectors, power supplies, thermal modules, SSDs, memory and high-speed interconnect parts.
Industrial	ABB will invest US$200 million to expand medium-voltage equipment production in Europe.	Data centers and electrification may increase demand for power modules, protection relays, sensors, switchgear and automation components.
Industrial	Schneider Electric expects India data center growth to outpace its core business.	AI-ready data centers support demand for UPS, switchgear, cooling equipment, sensors, monitoring devices and industrial power semiconductors.
Industrial	Siemens reported stronger-than-expected orders despite profit pressure.	Resilient industrial orders may support demand for PLCs, industrial sensors, connectivity modules, automation controllers and power electronics

Category	Updates	Insight
Robotics	Humanoid plans to deploy up to 2,000 robots across Schaeffler facilities by 2032	Factory humanoid deployment may increase demand for servo drives, motor controllers, encoders, sensors, PMICs and industrial-grade memory.
Robotics	Schaeffler expects humanoid robotics orders to reach hundreds of millions of euros by 2030.	Robotics supply-chain growth may benefit actuators, motor drivers, position sensors, precision bearings and industrial control components.
Robotics	Japan Airlines began humanoid robot trials at Haneda Airport using Unitree-based platforms.	Airport robot trials may support demand for vision sensors, edge AI processors, BMS, connectivity modules and rugged industrial storage
Robotics	AgiBot continued scaling humanoid robot production, reinforcing China’s embodied AI manufacturing push.	Larger robot volumes may support motion-control ICs, servo systems, cameras, industrial NAND, DRAM and embedded compute platforms

3.1 Artificial Intelligence

3.1.1 Microsoft's Biggest India Data Center on Track for Mid-2026

Microsoft's largest India data center is on track to go live in mid-2026, supporting its broader AI and cloud infrastructure expansion in Asia. The company had announced a major India investment plan, including $17.5 billion on top of an earlier $3 billion pledge. India is becoming a strategic AI market due to its large internet user base and deep technology talent pool. This indicates stronger future AI infrastructure demand in Asia. The main beneficiaries are AI servers, enterprise SSDs, networking equipment, power modules, liquid cooling, and data-center electrical infrastructure.

3.1.2 Google and Blackstone Launch AI Cloud Venture

Google and Blackstone announced a joint AI cloud venture, with Blackstone initially contributing $5 billion in equity to develop 500MW of data center capacity by 2027. The venture may reach $25 billion in total investment and will provide Google TPU-based compute-as-a-service. This is a clear signal of stronger AI compute demand. Supply-chain beneficiaries include AI servers, memory, high-speed interconnect, power systems, cooling, and data-center construction equipment.

3.1.3 Alibaba to Exceed RMB 380B AI Investment Plan

Alibaba said it expects to exceed its previously planned RMB380 billion AI investment over the next three years. The company said early returns from AI spending are encouraging it to further expand cloud-computing capacity. Although Alibaba's quarterly profit missed market expectations, investors responded positively to management's comments on AI monetization and future returns. This suggests Alibaba is continuing to position cloud and AI infrastructure as a key long-term growth area. Alibaba's higher AI spending points to stronger demand for China-based AI infrastructure. This may support procurement of AI servers, enterprise SSDs, networking equipment, power modules and cooling components. Domestic component suppliers may benefit as Chinese cloud providers continue to expand AI capacity under supply-chain localization pressure.

3.1.4 SoftBank to Invest €45B in France AI Data Center

SoftBank plans to invest €45 billion over five years to build AI data centers in France, with a focus on the Hauts-de-France region. The project aims to deliver around 3.1GW of capacity and could eventually expand further. France is positioning itself as a European AI infrastructure hub due to its power availability and nuclear energy base. Schneider Electric is expected to support modular infrastructure solutions, while EDF will provide a former power plant site for conversion into data center use. This is a major long-term demand driver for AI data center infrastructure in Europe. It may increase demand for AI servers, grid equipment, power distribution, cooling systems, energy management systems, SSDs and high-speed networking components. Power and thermal management suppliers may see stronger opportunities.

3.2 Automotive

3.2.1 BYD in Talks for European Plant Expansion

BYD is reportedly in discussions with Stellantis and other European automakers about taking over underused factories in Europe. The move would support BYD's strategy to localize EV production closer to European customers, reduce tariff exposure and improve regional supply-chain flexibility. BYD's preference is to operate facilities independently rather than through joint ventures. Localized EV production may increase demand for automotive-grade MCUs, BMS ICs, power modules, onboard charging components, sensors, vehicle connectivity modules and regional Tier-1 sourcing. This may also create stronger demand for Europe-certified automotive components.

3.2.2 Stellantis to Invest Over €1 Billion in Mulhouse EV Production

Stellantis announced more than €1 billion of investment to produce a new generation of EVs at its Mulhouse plant in France, with production expected from 2029. The investment forms part of Stellantis' broader electrification strategy and supports France's national electrification plan. This reinforces long-term EV component demand. Key beneficiaries include power semiconductors, BMS ICs, onboard chargers, automotive MCUs, vehicle sensors, automotive memory and infotainment-related electronic components.

3.2.3 Toyota Sales Drop for Third Consecutive Month

Toyota reported a third consecutive monthly decline in global vehicle sales, mainly due to weaker performance in China and the Middle East. The result suggests that demand remains uneven across regions, even for the world's largest automaker. While Toyota's production remains supported in some Asian markets, sales weakness in key regions could affect near-term procurement planning. This is a weaker short-term signal for automotive electronics demand in affected regions. Customers may become more cautious on inventory for automotive MCUs, infotainment modules, sensors, memory devices and vehicle connectivity components.

3.2.4 European BEV Sales Continue Growing in Early 2026

European battery-electric vehicle sales continued to grow in early 2026, with BEVs driving most EV volume growth. Autovista24 reported that BEVs added 146,703 units versus the same period in 2025, reaching 725,375 units and accounting for 67% of the EV market. This indicates that Europe remains a key EV growth region despite pricing pressure and competition.Higher BEV penetration supports demand for BMS ICs, power modules, SiC devices, thermal sensors, charging components, automotive-grade memory, high-voltage connectors and vehicle control electronics.

3.3 Healthcare

3.3.1 Philips Reports Stronger Sales, Margins and Order Growth

Philips reported stronger-than-expected sales, margins and order growth. The company maintained its full-year outlook and continued to focus on productivity improvements and pricing actions. The results suggest healthcare technology demand remains relatively stable, especially for imaging, monitoring and connected care equipment. Stable healthcare equipment demand may support procurement of embedded processors, medical sensors, displays, storage devices, connectivity modules and medical-grade power management components. This is a weaker signal for China diagnostics equipment demand. It may affect laboratory instrumentation, diagnostic modules, sensors and embedded electronics, while imaging-related demand may remain more resilient.

3.3.2 Siemens Healthineers Cuts Outlook on China Diagnostics Weakness

Siemens Healthineers lowered its 2026 revenue growth outlook due to weakness in its diagnostics division, especially in China. The market was affected by lower reimbursement rates and volume-based procurement policies. The pressure appears more concentrated in diagnostics rather than the overall medical imaging market. This is a weaker signal for China diagnostics equipment demand. It may affect laboratory instrumentation, diagnostic modules, sensors and embedded electronics, while imaging-related demand may remain more resilient.

3.3.3 Jardine Matheson to Acquire I-MED Radiology

Jardine Matheson agreed to acquire Australia's I-MED Radiology Network for around US$2.4 billion. I-MED operates more than 200 imaging clinics and performs millions of procedures annually. The deal reflects continued investment interest in radiology networks and healthcare infrastructure. Imaging network expansion may support demand for diagnostic imaging systems, medical workstations, storage servers, high-resolution displays, PACS infrastructure and AI radiology hardware.

3.3.4 Roche to Acquire PathAI for AI Diagnostics

Roche agreed to acquire PathAI, a U.S.-based digital pathology and AI diagnostics company. Roche plans to integrate PathAI into its diagnostics division to strengthen AI-enabled pathology and companion diagnostics. The acquisition supports the shift from manual pathology workflows toward automated, AI-assisted diagnostic processes.AI pathology adoption may increase demand for image processing hardware, medical servers, enterprise storage, high-resolution scanning systems and digital diagnostic infrastructure. This supports long-term demand for medical electronics and healthcare data systems.

3.4 Industrial

3.4.1 Foxconn Raises CapEx for AI Server Manufacturing

Foxconn said AI demand is supporting strong growth momentum and plans to increase capital expenditure by around 30% this year to expand AI server manufacturing capacity. Chairman Young Liu cited massive cloud service provider investment as a key driver. DigiTimes also reported that Foxconn's AI server business is scaling rapidly, supported by demand for computing infrastructure. This is a direct positive signal for the AI server supply chain. Demand may increase for server PCB, connectors, power supplies, thermal modules, SSDs, memory, cable assemblies, optics and high-speed interconnect components.

3.4.2 ABB Invests US$200 Million in European Grid Equipment

ABB announced about US$200 million of investment to expand medium-voltage grid equipment production in Europe. The investment is driven by rising electricity demand from data centers, electric vehicles, factories, hospitals and large buildings. ABB plans to expand several European facilities, including a new factory in Italy.AI data centers and electrification are increasing demand for electrical infrastructure. Component demand may rise for power modules, protection relays, industrial sensors, switchgear, monitoring systems and automation components.

3.4.3 Schneider Electric Sees India Data Center Business Outpacing Core Growth

Schneider Electric expects its India data center business to grow faster than its broader India operations over the next four to five years. Growth is driven by AI-ready infrastructure, hyperscalers, colocation providers and enterprise demand. Data centers are becoming a larger part of Schneider's India business as AI infrastructure expands. This supports demand for UPS systems, switchgear, cooling equipment, power semiconductors, sensors, monitoring devices and energy management systems. India's data center buildout may create steady demand for industrial power and control components.

3.4.4 Siemens Orders Rise More Than Expected

Siemens reported stronger-than-expected orders, although profit remained under pressure. Order strength suggests that demand for industrial infrastructure, automation and electrification remains resilient despite macro uncertainty. This indicates that industrial customers are still investing in automation and infrastructure upgrades.Stable industrial orders may support procurement of PLCs, industrial sensors, connectivity modules, automation controllers, power electronics and factory electrification components. However, margin pressure may keep customers cautious on pricing and inventory.

3.5 Robotics

3.5.1 Humanoid to Deploy Up to 2,000 Robots at Schaeffler Plants

British robotics company Humanoid plans to deploy 1,000 to 2,000 humanoid robots at Schaeffler manufacturing sites by 2032. Initial deployment is expected to begin from late 2026 to mid-2027 in Germany. The robots will support factory tasks such as box handling and production-line testing.This moves humanoid robotics closer to real factory deployment. Demand may increase for servo drives, motor controllers, encoders, sensors, industrial-grade memory, edge processors, batteries and power management solutions.

3.5.2 Schaeffler Targets Large Humanoid Robotics Order Book

Schaeffler said it expects humanoid robotics-related orders to reach hundreds of millions of euros by 2030. The company is positioning itself as a key supplier of mechanical and motion components for humanoid robots. This shows that traditional automotive and industrial suppliers are entering the robotics supply chain. This supports demand for actuators, precision bearings, motor drivers, position sensors, encoders and industrial control components. Robotics could become a meaningful component demand driver before the end of the decade.

3.5.3 Japan Airlines Starts Unitree-Based Humanoid Robot Trial

Japan Airlines partnered with GMO AI & Robotics to begin a humanoid robot trial in May 2026 using two Unitree-based humanoid platforms. The robots are used for labor-intensive airport tasks such as baggage loading, container transport and aircraft cabin cleaning. This is an early example of humanoid robots being tested in a real logistics and service environment. Commercial trials may increase demand for machine vision systems, edge AI processors, battery management systems, motor drivers, connectivity modules and rugged industrial storage devices.

3.5.4 AgiBot Scales Humanoid Robot Production

AgiBot continued to gain attention as one of the fastest-scaling humanoid robot companies in China. The company has reported large-scale production progress and is positioning itself as one of the largest humanoid robot makers globally. This reflects China’s push to move humanoid robots from prototype development toward manufacturing scale and commercial deployment. AgiBot continued to gain attention as one of the fastest-scaling humanoid robot companies in China. The company has reported large-scale production progress and is positioning itself as one of the largest humanoid robot makers globally. This reflects China’s push to move humanoid robots from prototype development toward manufacturing scale and commercial deployment.

04

Memory Market Trends

4. Memory Market Trends

4.1 Memory Market Overvie

- DDR4: Demand Recovery Drives Spot Price Increases; Micron’s New Line to Boost Supply by Year-End

- DDR5: Tight Supply and Vendor Inventory Controls Keep Server DDR5 Prices Rising Through June

- LPDDR: LPDDR4X and LPDDR5X Prices Expected to Rise Sharply in Q2

- HBM: Strong Demand and Limited Capacity Continue to Push Prices Higher; Shortages May Persist Until Q2 2027

- NAND Flash: MLC Production Cuts Reduce Supply and Drive Price Increases

- SSD: Contract Prices Rise While Spot Prices Soften, Showing Market Divergence

- HDD: Consumer HDD Demand Remains Weak; Enterprise HDD Market Stays Stable

4.2 Memory Brand Spot Market Reference Prices

SAMSUNG

Category	Specification	Price (USD)
DDR4	16Gb (1G*16)	~$60
DDR4	16Gb (2G*8)	~$75
DDR4	8Gb (512*16)	~$30
DDR4	8Gb (1G*8)	~$55
DDR4	4Gb (256*16)	~$12
DDR4	4Gb (512*8)	~$14
DDR4	64GB (Server)	~$1600
DDR4	32GB (Server)	~$1000
DDR4	16GB (Server)	~$650
DDR4	32GB (PC)	~$410
DDR4	16GB (PC)	~$170
DDR4	8GB (PC)	~$90
DDR4	4GB (PC)	~$55

Category	Specification	Price (USD)
DDR5	96GB (Server)	~$3800
DDR5	64GB (Server)	~$2500
DDR5	32GB (Server)	~$1200
DDR5	16GB (Server)	~$650
DDR5	32GB (PC)	~$450
DDR5	16GB (PC)	~$250
DDR5	8GB (PC)	~$150
SSD	7680GB/7.68TB (Enterprise-Grade)	~$3250
SSD	3840GB/3.84TB (Enterprise-Grade)	~$1700
SSD	1920GB/1.92TB (Enterprise-Grade)	~$1300
SSD	960GB/1TB (Enterprise-Grade)	~$750
SSD	480GB (Enterprise-Grade)	~$460
SSD	240GB (Enterprise-Grade)	~$250
SSD	2TB (Consumer-Grade)	~$350
SSD	1TB (Consumer-Grade)	~$250
SSD	512GB (Consumer-Grade)	~$185

Category	Specification Model	Price (USD)
NAND flash	1Gb-SLC	~$3.4-3.8
NAND flash	2Gb-SLC	~$4-4.4
NAND flash	4Gb-SLC	~$6.5-7.3
NAND flash	8Gb-SLC	~$14.2-15
NAND flash	16Gb-SLC	~$27-35

SK HYNIX

Category	Specification Model	Price (USD)
DDR4	16Gb (1G*16)	~$60
DDR4	16Gb (2G*8)	~$65
DDR4	8Gb (512*16)	~$46
DDR4	8Gb (1G*8)	~$40
DDR4	4Gb (256*16)	~$9
DDR4	64GB (Server)	~$1800
DDR4	32GB (Server)	~$1100
DDR4	16GB (Server)	~$750
DDR4	32GB (PC)	~$420
DDR4	16GB (PC)	~$200
DDR4	8GB (PC)	~$150
DDR4	4GB (PC)	~$85

Category	Specification	Price (USD))
DDR5	96GB (Server)	~$3900
DDR2	64GB (Server)	~$2500
DDR5	32GB (Server)	~$1200
DDR5	16GB (Server)	~$650
DDR5	32GB (PC)	~$430
DDR5	16GB (PC)	~$240
DDR5	8GB (PC)	~$150

Category	Specification	Price (USD)
NAND flash	1Gb-SLC	~$3.3-3.7
NAND flash	2Gb-SLC	~$3.6-4.3
NAND flash	4Gb-SLC	~$6.5-6.9

MICRON

Category	Specification	Price (USD)
DDR4	6Gb (1G*16)	~$65
DDR4	16Gb (2G*8)	~$75
DDR4	8Gb (512*16)	~$40
DDR4	8Gb (1G*8)	~$55
DDR4	64GB (Server)	~$1700
DDR4	32GB (Server)	~$900
DDR4	16GB (Server)	~$750
DDR4	32GB (PC)	~$420
DDR4	16GB (PC)	~$290
DDR4	8GB (PC)	~$170
DDR4	4GB (PC)	~$80

Category	Specification	Price (USD)
DDR5	96GB (Server)	~$4100
DDR5	64GB (Server)	~$2300
DDR5	32GB (Server)	~$1200
DDR5	16GB (Server)	~$700
DDR5	32GB (PC)	~$460
DDR5	16GB (PC)	~$280
DDR5	8GB (PC)	~$160
SSD	7680GB/7.68TB (Enterprise-Grade)	~$4500
SSD	3840GB/3.84TB (Enterprise-Grade)	~$2500
SSD	1920GB/1.92TB (Enterprise-Grade)	~$1500
SSD	960GB/1TB (Enterprise-Grade)	~$950
SSD	480GB (Enterprise-Grade)	~$500
SSD	240GB (Enterprise-Grade)	~$330

Category	Specification	Price (USD)
NAND flash	1Gb-SLC	~$3.3-3.7
NAND flash	2Gb-SLC	~$3.5-4.1
NAND flash	4Gb-SLC	~$6.2-6.8
NAND flash	8Gb-SLC	~$14-14.6

KIOXIA

Category	Specification	Price (USD)
NAND flash	1Gb-SLC	~$3.4-3.7
NAND flash	2Gb-SLC	~$3.3-3.7
NAND flash	4Gb-SLC	~$6.6-7.2
NAND flash	8Gb-SLC	~$12.4-13.8
NAND flash	16Gb-SLC	~$28-45

MXIC

Category	Specification	Price (USD)
NAND flash	1Gb-SLC	~$4
NAND flash	2Gb-SLC	~$6.5
NAND flash	4Gb-SLC	~$9

WINBOND

Category	Specification	Price (USD)
NAND flash	1Gb-SLC	~$3.2-5.2
NAND flash	2Gb-SLC	~$5.2
NAND flash	4Gb-SLC	~$8.8

NANYA

Category	Specification	Price (USD)
DDR4	8Gb (512*16)	~$45
DDR4	8Gb (1G*8)	~$47
DDR4	4Gb (256*16)	~$22
DDR4	4Gb (512*8)	~$25

CRUCIAL

Category	Specification	Price (USD)
DDR4	32GB (PC)	~$360
DDR4	16GB (PC)	~$170
DDR4	8GB (PC)	~$110
DDR5	32GB (PC)	~$400
DDR5	16GB (PC)	~$230
DDR5	8GB (PC)	~$130

KINGSTON

Category	Specification	Price (USD)
DDR4	64GB (Server)	~$1580
DDR4	32GB (Server)	~$1050
DDR4	16GB (Server)	~$640
DDR4	32GB (PC)	~$365
DDR4	16GB (PC)	~$185
DDR4	8GB (PC)	~$118
DDR5	96GB (Server)	~$3960
DDR5	64GB (Server)	~$2480
DDR5	32GB (Server)	~$1080
DDR5	16GB (Server)	~$580
DDR5	32GB (PC)	~$400
DDR5	16GB (PC)	~$230
DDR5	8GB (PC)	~$115

WD

Category	Specification	Price (USD)
HDD	24TB	~$1130
HDD	20TB	~$940
HDD	18TB	~$900
HDD	16TB	~$800
HDD	8TB	~$490

SEAGATE

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