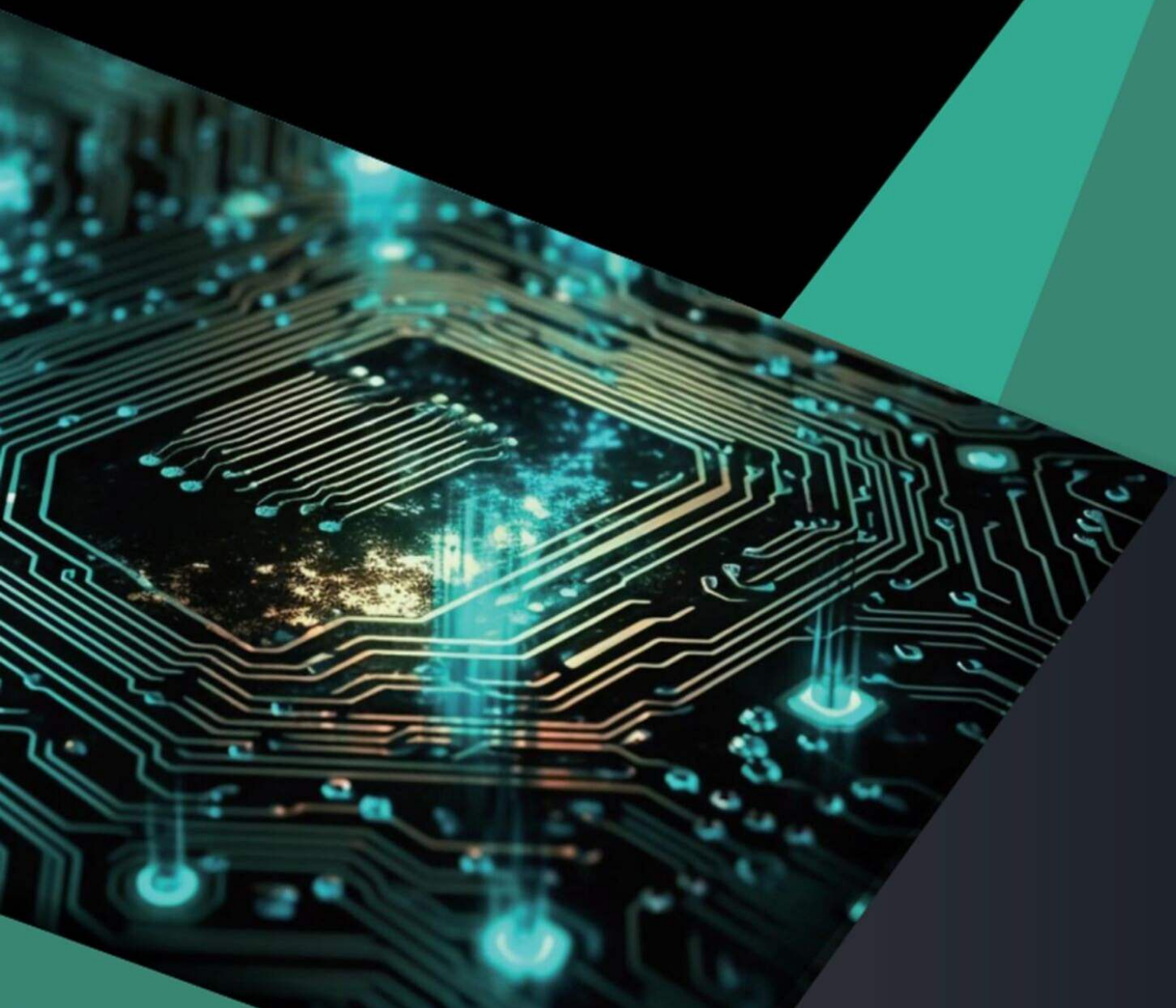
BRIOCEAN

June 2026

Monthly Market Research

Your preferred supplier for global sourcing



About Briocean

Established in 2008 and headquartered in Singapore, Briocean is an independent distributor of electronic components, offering strategic sourcing and integrated supply chain solutions to manufacturers across a wide range of industries. Our two quality assurance centres in Shenzhen and Hong Kong – featuring a combined 2,100 m^2 QC laboratory – enforce end-to-end traceability and rigorous component testing, ensuring every part meets the highest standards of authenticity, reliability, and performance.

We hold a comprehensive set of internationally recognised certifications, including AS6081, AS9120, ISO14001, ANSI/ESD S20.20-2021, and ISO9001 – with AS6081 and AS9120 underscoring our commitment to counterfeit avoidance and aerospace-grade quality management. Our industry leadership is consistently validated by independent rankings: 8th on Supply Chain Connect's Top APAC Distributor List in 2023, and in 2024, simultaneous recognition on both the Top 50 Global Distributor and the Top 25 Global Independent Distributors.

Summary

Category	Trend
Macroeconomics	- WSTS Spring Forecast: 2026 Global Semiconductor Market Projected at USD 1.51 Trillion, Up 89.9% YoY - U.S.: AI Chip Export Controls and Computing Infrastructure Investment Move in Parallel, Significantly Raising Supply Chain Compliance Hurdles - EU: Technology Sovereignty Package Unveiled; Netherlands Joins Pax Silica on Same Day - South Korea: "Three Mega Projects" Unveiled, KRW 800 Trillion Semiconductor Investment to Build Non-Capital Cluster - China: MIIT Issues Implementation Opinions on "AI + Information and Communication" Innovation Development
Industry	- MLCC Market: Epic Shortage Surge Driven by AI and EVs - STMicroelectronics: Second Price Hike Within Three Months - Texas Instruments: July 1 New Prices Take Effect, Analog IC Pricing Uptrend Confirmed - Infineon: Second Price Hike on July 1, AI-Driven Structural Shortage in Power Semiconductors - NXP: Price Hike Effective June 1; Demand Recovers but Remains Weak - Microchip: August Price Hike and Bearish Report Coincide, MCU Uptrend Confirmed - YAGEO: Full-Series Capacitor Price Hike Effective July 1, Passive Component Uptrend Widens - Analog Devices: Q2 Beat, AI Optimism Drives Valuation Higher - Broadcom: Jointly Launches Custom AI Chip with OpenAI; AI Semiconductor Business Continues Strong Growth - Renesas: Acquires Pictorus to Accelerate Embedded System Development Strategy - MediaTek: Issues Formal Price Hike Letter, Initiates Pricing Adjustment - Realtek: Select Product Line Hikes Over 10% from July - Yangjie Technology: Second Price Hike in 2026; EU Supply Continuity Secured - TSMC / NVIDIA: GTC Taipei Announces Deep AI Collaboration; Huang Attends COMPUTEX - Foundry Industry: Entering Full Pricing Uptrend

Category	Trend
End-market (Artificial Intelligence)	- Meta Explores New Funding for AI Infrastructure Expansion - AWS Expands AI and Cloud Infrastructure Investment in India - Tencent Places RMB20 Billion DRAM Order with CXMT
End-market (Automotive)	- BMW Completes US$1.7 Billion EV Production Investment in the U.S. - BYD Targets World's Largest Automaker Position - Jeep Expands European Electrification Strategy
End-market (Industrial)	- Honeywell Targets Industrial Automation Acquisitions - Schneider Electric to Acquire Cognite for US$3.1 Billion - Accenture Expands Industrial AI Collaboration with Siemens - Siemens Advances Software-Defined Industrial Automation
End-market (Robotics)	- Apptronik Launches Robot Park and Apollo 2 Humanoid Robot - Unitree Robotics Advances IPO Plans Amid Commercialization Push - Agility Robotics to Go Public Through SPAC Merger
Memory Market Trends	- DDR4：Supply remains tight, with prices at elevated levels and a stable-to-strong outlook - DDR5：Strong demand and limited supply have driven sharp contract price increases for months, with the market in shortage - LPDDR5：Prices remain high, pressuring the mobile segment - NAND Flash：Q2 contract prices are expected to rise sharply; NOR Flash and SLC NAND prices have more than doubled in 1H - SSD：Retail prices have surged since the start of the year; Kioxia launched high-end PCIe 5.0 products - HDD：Wholesale prices rose for the fifth consecutive quarter, with average prices doubling from baseline levels and no signs of slowing

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Macro Environment Updates

1. Macro Environment

1.1 Industry Policy

1.1.1 WSTS Spring Forecast: 2026 Global Semiconductor Market Projected at USD 1.51 Trillion, Up 89.9% YoY

On June 2, the World Semiconductor Trade Statistics (WSTS) released its Spring 2026 semiconductor market forecast, projecting the global market at USD 1.5112 trillion in 2026, up 89.9% year-on-year—a record high. WSTS had previously forecast USD 975.4 billion in December 2025 (up 26.3% YoY), but revised sharply upward as data center adoption exceeded expectations. Growth is led by memory chips, with 2026 memory sales forecast to surge approximately 249.5% YoY to USD 803.9 billion, driven by sustained strong demand for AI infrastructure, high-bandwidth memory (HBM), and accelerated computing platforms. Logic chips are expected to grow 37.3% YoY to USD 411.3 billion; microprocessors, analog chips, discrete semiconductors, sensors, and optoelectronics are projected to grow 20%, 10%, 8%, and 3%, respectively. Regionally, the Americas lead with 112% YoY growth, followed by Asia-Pacific at 87%, Europe at 58%, and Japan at 28%. Looking ahead to 2027, WSTS forecasts the global semiconductor market to grow about 27% to USD 1.9 trillion, with memory and logic chips rising 32% and 27%, respectively.

1.1.2 U.S.: AI Chip Export Controls and Computing Infrastructure Investment Move in Parallel, Significantly Raising Supply Chain Compliance Hurdles

On May 31, the Bureau of Industry and Security, U.S. Department of Commerce (BIS) issued new export control guidance, explicitly requiring export licenses for advanced AI chips to entities headquartered in China or Macao, regardless of where the entity is registered, under a "presumption of denial" review policy. Affected products include high-end AI accelerators such as Nvidia's Rubin and Blackwell series and AMD's MI350X. Exporters must conduct look-through checks on the ultimate parent company's location, and compliance due diligence requirements have become significantly more stringent. Meanwhile, BIS maintains a limited "case-by-case" review pathway for H200 and AMD MI325X, subject to a total processing performance below 21,000 and multiple conditions: total computing power of exports to China must not exceed 50% of that to the U.S.; chips must be tested by a U.S. third-party lab; procurement costs incur a 25% increase; and case-by-case review applies only to direct exports from the U.S. On the computing infrastructure front, Coherent received USD 50 million in CHIPS Act subsidies to expand its indium phosphide wafer fab in Texas, quadrupling

capacity; OpenAI and Broadcom jointly launched their first custom inference chip, Jalapeño. Overall, the U.S. is tightening AI chip export controls to China while accelerating domestic computing infrastructure investment, shifting the control rationale from restricting product flows to limiting capability acquisition, significantly raising supply chain compliance barriers.

1.1.3 EU: Technology Sovereignty Package Unveiled; Netherlands Joins Pax Silica on Same Day

On June 3, the European Commission unveiled the European Technology Sovereignty Package, comprising the Chips Act 2.0 and the Cloud and AI Development Act. The Chips Act 2.0 shifts from supply-driven to demand-pull via public procurement and linking telecom/defense with chipmakers; the European Court of Auditors now projects the EU's 2030 global capacity share below 12%, down from 20%. For the first time, it allows direct EC investment in cross-border projects, plans to mobilize EUR 120 bn (approx. USD 131 bn) by 2035, and build a pilot advanced-process fab line between 2030–2033. The Cloud and AI Development Act aims to triple data center capacity in 5–7 years and sets a sovereignty framework; U.S. firms would face hurdles for top certification as the CLOUD Act allows U.S. access to overseas data. On June 23, Dutch Trade Minister Sjoertsma signed a Washington agreement to join the U.S.-led Pax Silica alliance, after South Korea and Japan; the EU is expected to follow. He also lobbied on the MATCH Act, noting shared goals but cautioning that certain provisions could give the U.S. unilateral control over Dutch security and business decisions, calling compulsion unacceptable. The U.S. and Netherlands agree on restricting ASML's most advanced exports to China but differ on sub-advanced equipment sales and service. The move coincides with a planned trade delegation to China in early July, highlighting its U.S.-China dilemma. The package awaits European Parliament and Council review; industry worries local content rules may fragment supply chains.

1.1.4 South Korea: "Three Mega Projects" Unveiled, KRW 800 Trillion Semiconductor Investment to Build Non-Capital Cluster

On June 29, President Lee Jae Myung announced at Cheong Wa Dae the "Three Mega Projects" covering semiconductors, physical AI, and AI data centers. In semiconductors, Samsung Electronics and SK Hynix will invest a combined KRW 800 trillion (approx. USD 526 billion) in the southwestern region (Gwangju, etc.), each building two memory wafer fabs – the largest private investment in Korean history, exceeding the government's KRW 728 trillion (approx. USD 479 billion) 2026 budget. The two also plan HBM wafer fabs in Chungcheong and materials/parts/equipment lines in the southeastern and Daegyeong regions. For physical AI, the government will accelerate manufacturing AI, deploy 1,000+ industry-specific robots annually, and build a robot foundry in Saemangeum. For AI data centers, SK Group, GS Group, and NAVER will jointly raise KRW 550 trillion (approx. USD 362 billion) by 2029 for 8.4 GW capacity, with cumulative investment exceeding KRW 1,000 trillion (approx. USD 658 billion) by 2035 reaching 18.4 GW. As R&D support, the "Super Innovation Economy Project" allocates KRW 500 billion (approx. USD 329 million) for next-gen power semiconductors (GaN, SiC), targeting 1200V SiC MOSFET mass production by 2027 and doubling self-sufficiency by 2030. This marks the strategic shift of Korea's semiconductor industry from a Gyeonggi-do single hub to a second hub in the southwestern.

1.1.5 China: MIIT Issues Implementation Opinions on "AI + Information and Communication" Innovation Development

On June 10, the Ministry of Industry and Information Technology (MIIT) issued the "Implementation Opinions on AI + Information and Communication Innovation Development (2026–2028)." The Opinions explicitly call for strengthening R&D of high-end optoelectronic chips and devices, including high-speed optoelectronic chips, high-speed forwarding/switching chips, all-optical switching devices, and co-packaged optics (CPO), and for conducting optoelectronic hybrid networking trials to accelerate technology maturity. They also call for tackling optoelectronic interconnection technologies for AI supernodes and conducting verification of AI networking technologies and products. The policy positions optoelectronic chips, optical circuit switching devices, and CPO as the foundation for AI development.

1.2 Economic Indicators

1.2.1 Global Manufacturing PMI Held at 52.6 in May; Output Growth Hit Near Five-Year High, Yet Demand Sustainability in Question

Global manufacturing expanded for the tenth consecutive month in May 2026, with the J.P. Morgan PMI at 52.6, unchanged from April. Output growth was the fastest since July 2021, and new orders rose for a fifth straight month, nearing April's 50-month peak. However, gains were driven largely by pre-emptive buying and inventory buildup ahead of expected price hikes and supply disruptions; input price inflation hit a four-year high, supplier delivery times worsened to the most severe since August 2022, and business optimism fell to a seven-month low. Regionally, the U.S. PMI rose to 55.1 (highest since May 2022) with strong output, though export orders fell for the 11th consecutive month on geopolitical and tariff concerns. The Eurozone PMI eased to 51.6 from 52.2, with stalled new orders, falling exports, surging input costs and output prices, and the worst supply delays since June 2022. Japan's PMI dipped to 54.5 (from 55.1) but remained in expansion for five months, with export orders growing at the fastest pace since May 2021. China's PMI stood at 51.8 (sixth straight month of expansion), with new orders among the strongest in five years but export orders edging down; input and output prices both fell month-on-month for the first time in six and seven months, respectively. South Korea's PMI jumped to 54.8 (highest since March 2021) with output and new orders at near-five-year peaks, though export orders dipped and input cost pressures remained high. India's PMI came in at 55.0, a three-month high, driven by domestic demand, with solid yet moderated export growth and persistent cost inflation. Overall, May's expansion was fueled by AI demand and precautionary restocking, yet Middle East-driven supply chain strains and rising costs cloud sustainability, as major economies diverge sharply.

Global Manufacturing by Region PMI

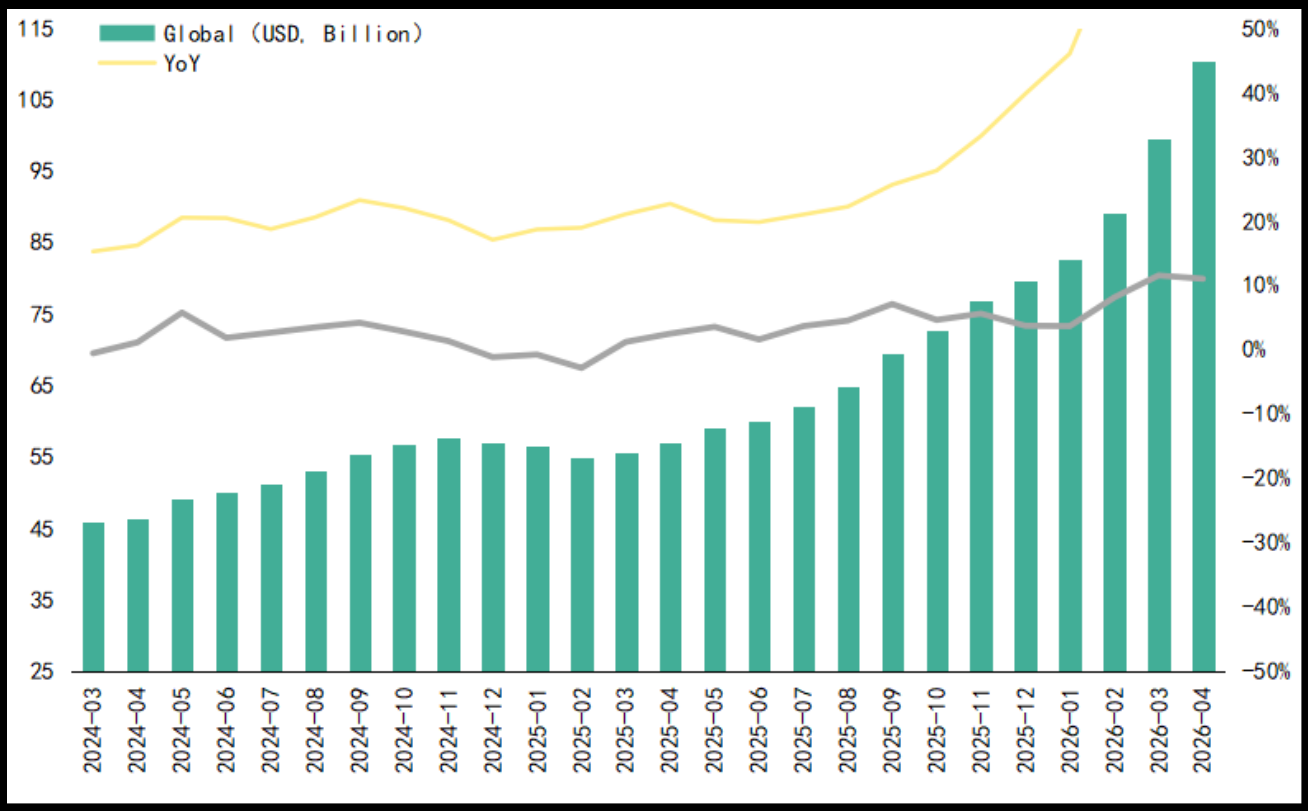
Period	Global	China	Japan	Korea	India	Americas	Eurozone
2023-11	49.30	49.40	48.30	50.00	56.00	46.70	44.20
2023-12	49.00	49.00	47.90	49.90	54.90	47.40	44.40
2024-01	50.00	49.20	48.00	51.20	56.50	49.10	46.60
2024-02	50.30	49.10	47.20	50.70	56.90	47.80	46.50
2024-03	50.60	50.80	48.20	49.80	59.10	50.30	46.10
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
2026-05	52.60	50.00	54.50	54.80	55.00	55.10	51.60

Source : Wind

1.2.2 Global Semiconductor Sales: Up 11% MoM to USD 110.5 Billion in April, YoY +93.9%

On June 5, SIA reported April global semiconductor sales of USD 110.5 billion, up 11% month-on-month from USD 99.5 billion in March, and up 93.9% year-on-year from USD 56.9 billion in April 2025 – marking the 14th consecutive monthly increase. SIA President and CEO John Neuffer attributed the strong growth to sales in the Asia-Pacific, Americas, and China. Regionally, YoY growth was led by the Americas at 115.8%, Asia-Pacific/Other at 114.9%, China at 78.6%, Europe at 54.7%, and Japan at 15.6%. On a MoM basis, the Americas rose 16.7%, Asia-Pacific/Other 8.7%, China 8.0%, Europe 6.7%, and Japan 6.4%. SIA endorsed the WSTS spring forecast of 90% growth to USD 1.5 trillion in 2026, with 2027 sales exceeding USD 1.9 trillion, driven by AI infrastructure deployments. SIA also urged U.S. policymakers to adopt industry policies that help the U.S. capture innovation and growth shares in the global semiconductor expansion to support economic competitiveness and national security.

Global Semiconductor Sales (Billion US Dollars)

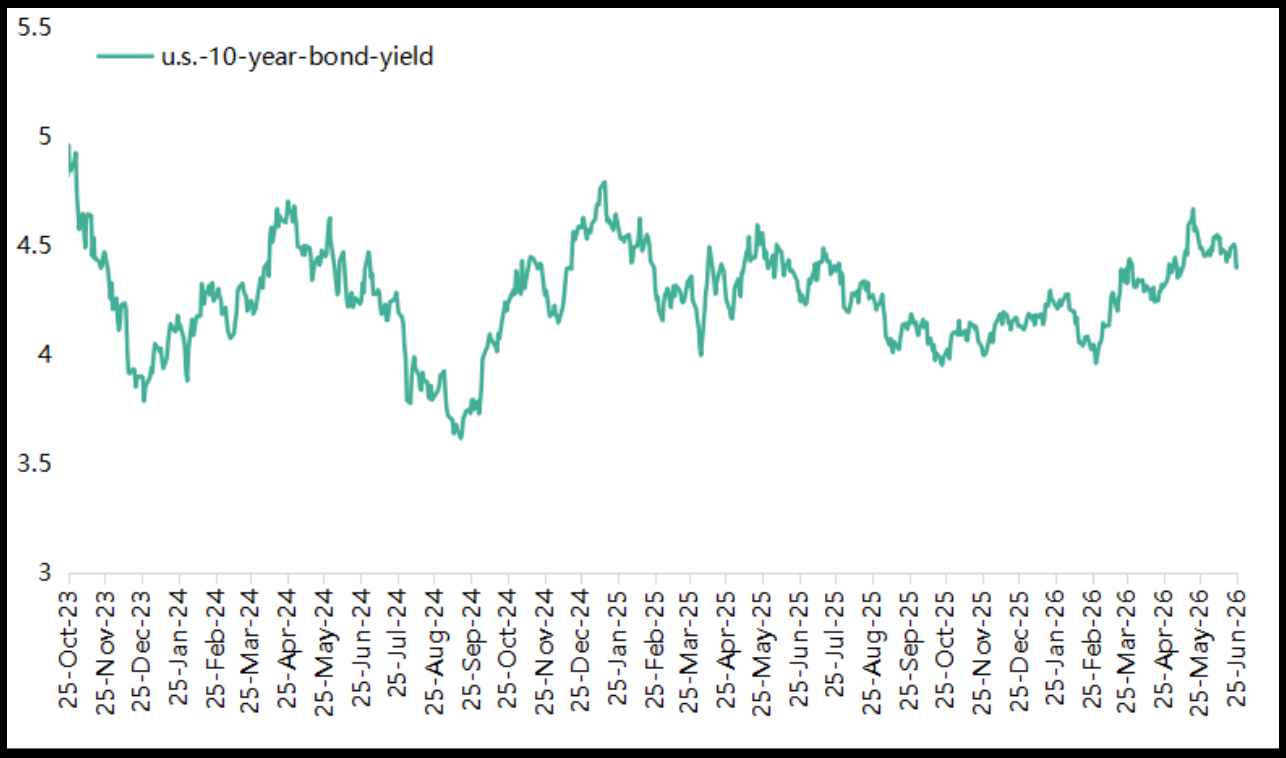


Source：SIA

1.2.3 U.S. 10-Year Treasury Yield Fluctuated in June; Hawkish Policy Signals and Easing Geopolitical Risks Alternated

In June 2026, the U.S. 10-year Treasury yield moved higher early then retreated, ending the month at 4.409% from 4.477% at the start – down about 6.8 bps over the month, with a trading range of roughly 4.39%–4.58%. In early June, stronger-than-expected May nonfarm payrolls (172,000 new jobs, nearly double market expectations) pushed yields toward 4.55%. On June 10, the May CPI rose 4.2% YoY (a near-three-year high), but core CPI MoM came in below expectations at 0.21%, drawing a muted reaction. The June 16–18 FOMC meeting proved a key inflection point: the Fed held rates at 3.50%–3.75% (fourth straight hold), but the dot plot turned notably hawkish – nine of 18 officials supported a rate hike in 2026, the median year-end rate forecast was raised from 3.4% to 3.8%, and PCE inflation expectations were lifted sharply from 2.7% to 3.6%. This marked the first shift from rate-cut to rate-hike expectations since 2025. Short-term yields rose more, narrowing the 2s10s spread to about 27 bps and flattening the curve significantly. In late June, resumption of U.S.–Iran technical talks eased oil prices and geopolitical tensions, while safe-haven flows drove a 10.5-bp drop in the 10-year yield to 4.394% on June 24 – the lowest since May 11. Overall, the 10-year yield's average level was roughly flat from May, but intra-month volatility intensified; the return of rate-hike expectations points to marginal tightening in macro liquidity, putting some pressure on valuations of growth-oriented semiconductor assets.

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

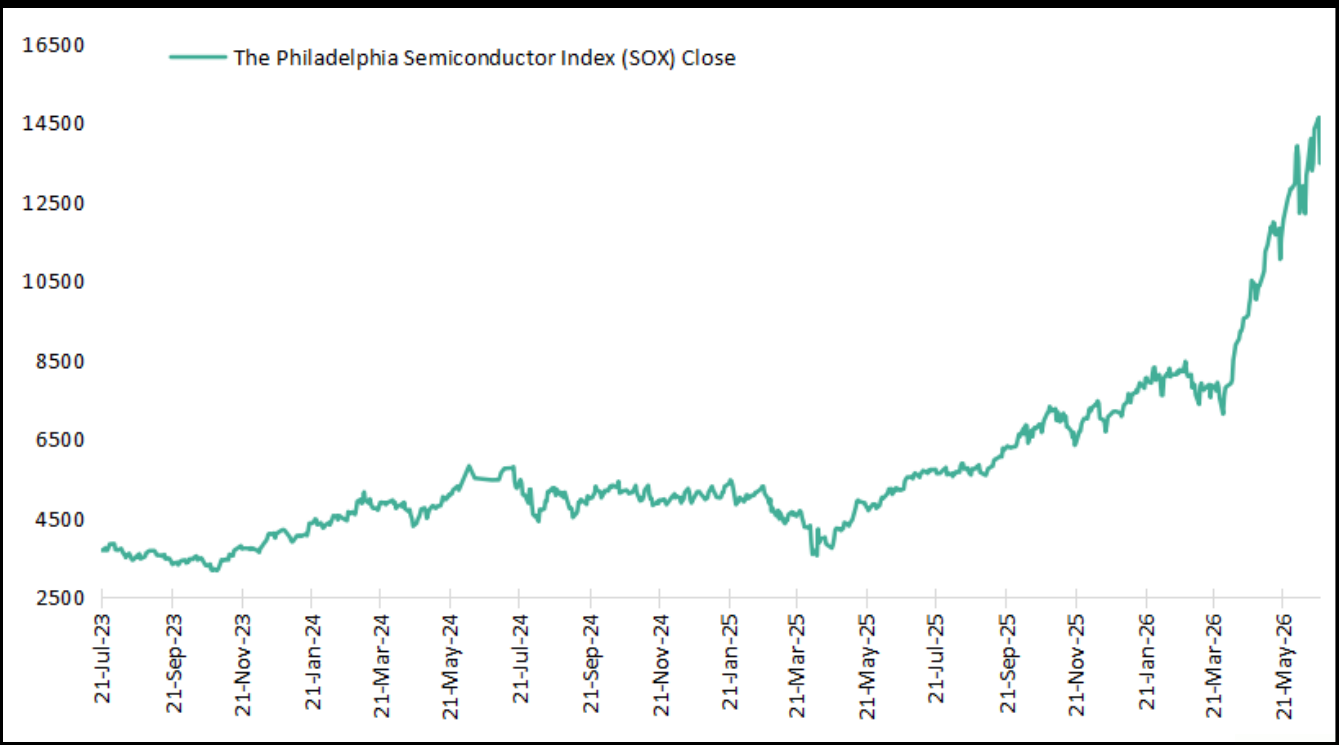


Source : Investing

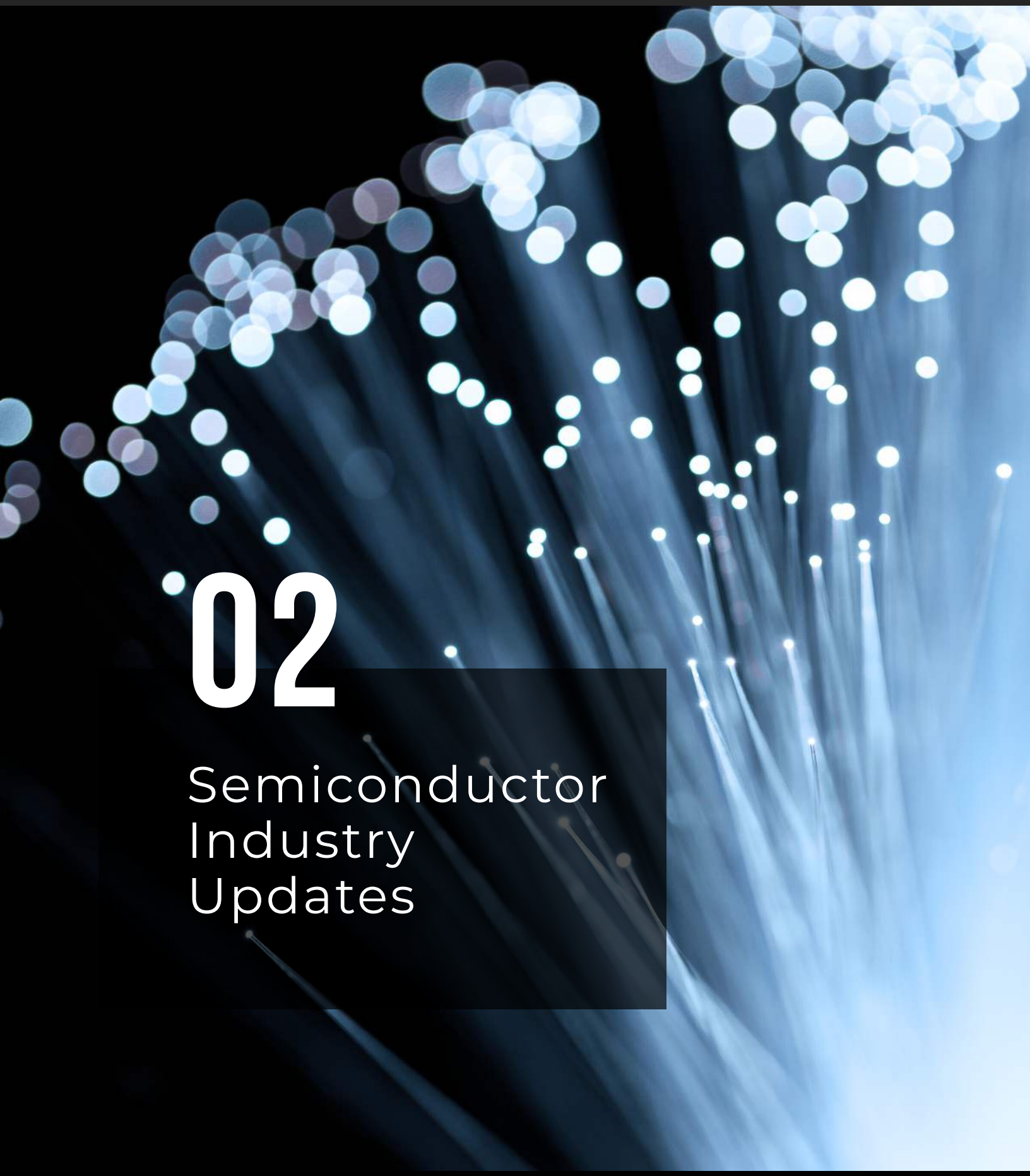
1.2.4 Philadelphia Semiconductor Index (SOX) Broke Through 12,000 in May; Mid-Month Volatility Increased but AI Theme Remained Intact

In May 2026, the SOX continued its uptrend, rising from 10,387.84 at April's close to 12,829.38 on May 29 – a monthly gain of about 23.5%. The index accelerated early, hitting a mid-month high of 12,108.67 on May 11, then pulled back to 11,053.99 by May 19. It regained traction in the second half, climbing back above 12,000 on May 22, closing at 12,616.63 on May 26, and ending the month at 12,829.38 – with an intra-month peak of 13,115.28 reached on May 29. Volatility rose markedly, with heightened long-short dynamics, but the overall uptrend remained intact. The core driver continued to be sustained demand for AI computing, exceeding expectations: NVIDIA's H200 export license to China received U.S. approval (pending Chinese procurement clearance), TSMC's 2nm process progressed smoothly, and global AI server orders remained robust. The U.S. 10-year Treasury yield traded in a 4.3%–4.6% range, posing no major pressure on high-valuation tech names. While near-term correction risks built up after the rapid run-up, they were partially released mid-month. With support from AI demand, advanced node progression, and restocking, semiconductor industry fundamentals remain on an upward trajectory. Market attention should focus on subsequent Fed policy signals and developments in U.S.–China semiconductor competition.

The Philadelphia Semiconductor Index (SOX)



Source：MacroMicro



02

Semiconductor Industry Updates

Semiconductor Industry Overview

Manufacturer	Updates	Key Data	Trend & Impact (Incl. Models)
MLCC Market	Murata, Taiyo Yuden, Samsung Electro-Mechanics, and other global leading manufacturers collectively raised prices	Murata 47μF MLCC rose from RMB 0.2 to 0.65 (approx. USD 0.03–0.09); high-end lead times extended to >20 weeks	Driven by AI server and EV demand; spot prices quoted every half hour at Huaqiangbei, Shenzhen.
STMicroelectronics (ST)	Second full-line price hike in 2026 effective June 28	Two hikes within ~two months; Q1 revenue +23.0% YoY	Covers STM32 MCUs, power MOSFETs (STP series), IGBTs and SiC devices (SCT series); driven by AI demand spillover and cost push.
Texas Instruments (TI)	Price adjustment notice on May 7, effective July 1; fourth round since 2025	April 2026 increases 15%–85%; new hike in July	Covers PMICs, MOSFETs, digital isolators; driven by AI server demand, high copper prices, and foundry cost hikes; analog IC pricing upturn confirmed.
INFINEON	Second price hike in 2026 effective July 1 (announced May 26)	Following April's first round	Power devices hold firm; automotive HV MOSFETs and SiC devices command 30%–50% premiums; AI-driven structural shortage persists.
NXP	Price adjustment implemented June 1 (notified May 1)	Inflationary cost pressures covering raw materials, energy, labor, logistics, and supplier inputs	Strong demand for i.MX series and some end-of-life parts.
MICROCHIP	Price increase notice on June 29 (effective Aug 14); JCapital Research issued bearish report	Data center sales USD 302.7M, far below Marvell (USD 4.0B) and Broadcom (USD 20.0B)	Cost pressures from materials, labor, logistics, energy, and wafer foundry; data center business expected to grow 67% this year but lags peers; MCU supply tight.

Semiconductor Industry Overview

Manufacturer	Updates	Key Data	Trend & Impact (Incl. Models)
YAGEO	Full-series capacitor price hike effective July 1	Covers MLCC, aluminum electrolytic, tantalum, polymer aluminum, film, supercapacitors; ~50% of revenue; original factory hike ~50%	First-time inclusion of direct customers (EMS/OEM); spot and contract prices both increases.
ANALOG DEVICES	Q2 results beat; stock hits all-time high	Q2 revenue USD 3.62B, EPS USD 3.09 above estimates; June stock +7.64%, YTD +64.26%	Automotive business key support; AI infrastructure optimism buoyed segment.
BROADCOM	Jointly launched first custom AI chip "Jalapeño" with OpenAI	AI semiconductor Q2 revenue USD 10.8B, +143% YoY; FY2026 expected ~USD 56.0B	Positioned as LLM inference processor; Celestica handles industrialization, targeting gigawatt-scale data center deployment by end-2026.
RENESAS	Completed acquisition of Pictorus (cloud-based behavioral modeling platform)	Enhances Renesas365 platform value	Accelerates embedded system development; expands cloud "full-suite" strategy from PCB design to algorithm simulation.
MediaTek	Issued formal price increase letter (first in recent years) signed by GM/COO	Hikes 10%–15% covering handset chips, PMICs, etc.	Formal letter-based price adjustment mechanism initiated.
REALTEK	Selective product line price hikes from July	Certain lines up >10%	Covers networking, connectivity, consumer, and specialty chips; benefits from Wi-Fi, Ethernet, switch demand improvement and AIPC-driven spec upgrades.

Semiconductor Industry Overview

Manufacturer	Updates	Key Data	Trend & Impact (Incl. Models)
YANGJIE TECHNOLOGY	Second round of price hikes in 2026 (announced June 23, effective July 1)	10%–15% increase across all products – diodes/thyristors/MOSFETs/ IGBTs/SiC	Received 9-month EU exemption, allowing normal procurement by European customers.
TSMC NVIDIA	GTC Taipei announced full integration of NVIDIA accelerated computing and AI technologies into TSMC fabs	Lithography costs expected to drop 50%; TSMC 3nm monthly capacity expanded to 160k–175k wafers yet still insufficient	Optimizes entire workflow from computational lithography, transistor simulation, defect inspection, to factory operations; deepens AI semiconductor "triangular alliance" global supply chain position.
FOUNDRY INDUSTRY	Price hikes from 2H26 onwards	UMC plans targeted hikes in 2H26 and broad negotiations in 2027; VIS announced increases accepted by clients	Hikes likely extend to 2027; overall foundry quotes enter upward cycle.

2.1 Manufacturer Dynamics In-Depth Analysis

2.1.1 MLCC Market: Epic Shortage Surge Driven by AI and EVs

The MLCC market is experiencing an epic shortage. Driven by strong demand from AI servers and EVs, spot prices in Shenzhen's Huaqiangbei market are highly volatile, with quotes changing every half hour. High-capacitance products are severely constrained, and lead times for some high-end products have extended beyond 20 weeks. For example, Murata's 47μF MLCC surged from below RMB 0.2 to RMB 0.65 (approx. USD 0.03–0.09); Samsung Electro-Mechanics products also jumped from RMB 100+ to RMB 400–500 per reel (approx. USD 14–70). On the demand side, AI server upgrades to rack-level high-density computing platforms require 8-10x more MLCCs than traditional servers. With NVIDIA's AI chip upgrades, MLCC value per rack has soared from USD 3,000 for H100 to USD 12,000 for GB200, and future Rubin Ultra mass production could reach USD 40,000, with MLCC count per rack rising from 15,000 to over 90,000. EV electronics also contribute significantly – pure EVs use about 6x more MLCCs than ICE vehicles. On the supply side, high-capacitance MLCCs consume sintering capacity tens of times more than low-capacitance products, crowding out general capacity. Murata raised prices by 15%–35% in April for AI server and automotive MLCCs, Taiyo Yuden followed in May, and Samsung Electro-Mechanics hiked consumer MLCC prices from June 1. TrendForce surveys show some distributors are pre-emptively stockpiling. Given mid-to-high-end capacity expansion cycles, the supply-demand gap is expected to persist at least through 2028.

2.1.2 STMicroelectronics: Second Price Hike Within Three Months

On May 28, STMicroelectronics notified customers of a price increase effective June 28 for select products, its second hike in 2026 (first announced March 24, effective April 26), with only two months between them. The company cited persistent inflationary pressures on raw materials, transportation, and labor, with this round targeting products not covered previously. The hike is driven by supply-side capacity constraints and AI demand growth – mature-node wafer capacity remains tight, with foundries prioritizing PMIC, MCU, and other high-value products; UMC has planned targeted foundry price hikes in 2H26 and broad negotiations in 2027. Meanwhile, NOR flash price hikes have also been transmitted to the MCU supply chain. The increase covers STM32 MCUs, power MOSFETs (STP series), IGBTs, and SiC power devices (SCT series). Industry expects MCU demand in automotive, industrial control, and AIoT to remain high in 2H, and if wafer and memory costs do not decline, more chip designers may face cost pass-through pressure.

2.1.3 Texas Instruments: July 1 New Prices Take Effect, Analog IC Pricing Uptrend Confirmed

On May 7, Texas Instruments (TI) notified global distributors and direct customers of a price adjustment effective July 1, 2026, covering PMICs, MOSFETs, and other key product lines. This marks TI's fourth price hike since 2025 – previous rounds took effect in June 2025, August 2025, and April 2026, with the April increase ranging 15%–85% across digital isolators, power management ICs, and others. TI's repeated adjustments confirm that the analog IC industry has entered a definitive pricing uptrend.

The underlying logic: AI infrastructure investment is extending from GPU computing to power infrastructure. As AI server rack power density jumps from 10–20 kW to over 100 kW, demand for high-voltage MOSFETs and IGBTs multiplies, boosting both analog chip volume and value. On the supply side, LME spot copper hit USD 14,097/ton in mid-May, keeping raw material costs elevated; coupled with wafer foundry and backend assembly/test price hikes in 2026, multiple cost pressures reinforce analog pricing rigidity. As the global analog leader, TI's pricing strategy sets a clear benchmark for the industry.

2.1.4 Infineon: Second Price Hike on July 1, AI-Driven Structural Shortage in Power Semiconductors

On May 26, Infineon notified customers of a price adjustment effective July 1, 2026 – its second hike in 2026 following an initial round in April. The company cited rising supply chain costs from geopolitical tensions (energy, raw materials, transport, and services) and market demand growing well beyond expectations.

In the current market, power device prices remain elevated: IGBTs command a 10%–25% spot premium, while automotive HV MOSFETs and SiC devices see premiums as high as 30%–50%. AI compute capacity is crowding out power semiconductor capacity – AI data centers use SiC (high-voltage), GaN (mid-to-low voltage), and silicon-based MOSFETs, displacing wafer capacity and creating spillover effects that tighten supply for automotive and industrial segments. Products for automotive, renewable energy, and AI power supplies remain in short supply, and the tight supply-demand balance is expected to persist at least through the first half of 2027.

2.1.5 NXP: Price Hike Effective June 1; Demand Recovers but Remains Weak

NXP notified customers on May 1 of a price adjustment effective June 1, 2026, driven by inflationary cost pressures across raw materials, energy, labor, logistics, and supplier inputs. This followed an initial hike on April 1 for selected products. Demand has picked up modestly but remains generally soft, concentrated in i.MX series and some end-of-life parts. Notably, the June 1 hike is a second round, supplementing the April round which targeted smaller clients; this round focuses on large customers with an increase of about 10%.

2.1.6 Microchip: August Price Hike and Bearish Report Coincide, MCU Uptrend Confirmed

On June 29, Microchip notified customers of a price adjustment effective August 14, 2026, for selected products, citing rising costs of materials, labor, logistics, energy, and manufacturing from suppliers, packaging, and foundries. While specific increases were not disclosed, the company stated that changes apply broadly across product lines. Microchip, often called the "canary in the coal mine" for semiconductors due to its diverse end-market exposure, joins peers (TI, Infineon, NXP, ST) in signaling a full-scale MCU pricing uptrend amid tight supply. Separately, J Capital Research issued a bearish report in June, noting Microchip's data center sales of USD 302.7 million, far below Marvell's USD 4.0 billion (up 88% YoY) and Broadcom's USD 20.0 billion (up 65%). Although Microchip expects 67% growth in its data center business this year, its absolute scale lags peers. The concurrent price hike and bearish report highlight dual pressures: passing through costs to sustain profitability while accelerating high-growth segment investments to address competitiveness concerns. Microchip stressed the hike will not impact Q4 FY2026 (ending June 30, 2026) results or previous guidance.

2.1.7 YAGEO: Full-Series Capacitor Price Hike Effective July 1, Passive Component Uptrend Widens

On July 1, YAGEO, a global passive component leader, raised prices across its entire capacitor portfolio, including MLCC, aluminum electrolytic, tantalum, polymer aluminum, film, and supercapacitors – its broadest adjustment in recent years. Distributors indicate original factory prices rose about 50%, with spot prices climbing even more. Notably, the hike extends for the first time to direct customers (EMS/OEM), meaning both spot and contract prices rise; as direct clients account for over half of revenue, this will significantly boost YAGEO's top and bottom lines. The affected products represent ~50% of revenue. Chairman Chen Tai-ming cited a "very busy" second half and optimism for AI, automotive, and high-performance computing. The

underlying driver mirrors the MLCC shortage: AI servers, HPC, and EV demand drive higher-tier passive components. Rising server TDP, particularly with NVIDIA Vera Rubin expected to mass-produce in Q4, elevates passives' role in 800V HVDC power architectures. Passives have moved from the bottom of BOM cost rankings to a critical position just after GPUs and memory. CITIC Securities expects more MLCC suppliers to follow YAGEO's lead, with the current MLCC uptrend likely to last over a year and prices potentially doubling or tripling.

2.1.8 Analog Devices: Q2 Beat, AI Optimism Drives Valuation Higher

ADI reported Q2 FY2026 revenue of USD 3.62 billion and EPS of USD 3.09, both above consensus (USD 3.5 billion and USD 2.92). Automotive was a key support. In terms of share price performance, ADI reached a record high of $442.0 on June 22, with a 7.64% gain in June and a 64.26% increase year-to-date. Growing optimism over AI infrastructure and supply chain pricing power buoyed investor sentiment. Product-wise, ADI's automotive and industrial isolation chips are prioritized for new energy and industrial controls, extending lead times for high-end isolation and high-speed ADCs, with some models (e.g., ADM2587, LT1076CQ) in tight supply.

2.1.9 Broadcom: Jointly Launches Custom AI Chip with OpenAI; AI Semiconductor Business Continues Strong Growth

On June 25, OpenAI and Broadcom unveiled their first custom AI chip "Jalapeño," positioned as an inference processor for LLMs. Broadcom and Celestica handle industrialization, with a multi-generation roadmap and plans for gigawatt-scale data center deployment from end-2026 with partners including Microsoft. In Q2 FY2026, Broadcom's AI semiconductor revenue reached USD 10.8 billion, up 143% YoY. The company expects ~USD 56.0 billion for FY2026, up from ~USD 20.0 billion last year. However, its Q3 AI revenue guidance of USD 16.0 billion missed consensus of USD 17.2 billion, raising some concerns.

2.1.10 Renesas: Acquires Pictorus to Accelerate Embedded System Development Strategy

In June, Renesas completed its acquisition of Pictorus, gaining a cloud-based behavioral modeling platform that accelerates embedded system development, moving engineering from standalone tools to connected platform-based model-driven design. The acquisition enhances the Renesas 365 platform launched in March, which unifies the full electronic system development lifecycle from exploration to lifecycle management. Pictorus enables engineers to describe behavior with block diagrams in a web browser, simulate them, and convert them to executable embedded software. This marks Renesas' push to offer a complete cloud toolchain from PCB design to algorithm simulation via consecutive acquisitions (Altium and Pictorus), redefining competitive boundaries through development experience.

2.1.11 MediaTek: Issues Formal Price Hike Letter, Initiates Pricing Adjustment

Supply chain sources indicate MediaTek has sent formal price increase notices to customers, signed by the General Manager and COO – a first in recent years. The company cited persistent challenges: component shortages, capacity constraints, supplier lead-time extensions, and rising material and logistics costs. The hike covers handset chips, PMICs, and others, ranging 10%–15%. Chairman Tsai Ming-kai had previously noted that surging AI compute demand has caused shortages and price hikes on key components, and MediaTek may adjust prices to pass on higher costs. Industry analysts see cost pressures shifting to IC design firms as advanced nodes, packaging, and key components tighten amid growing AI server and HPC demand.

2.1.12 Realtek: Select Product Line Hikes Over 10% from July

Realtek will raise prices on select product lines from July, with increases exceeding 10%, covering networking, connectivity, consumer, and specialty chips. Benefiting from improving Wi-Fi, Ethernet, and switch demand, along with spec upgrades driven by AI PCs, enterprise networking, and high-speed applications, some product quotes are supported. Supply chain analysis notes that cost hikes across foundry, packaging, silicon wafers, memory, and passives are transmitting to chip-level. Realtek, previously more consumer-oriented with limited pricing power in weak demand, now sees supply tightening for PMICs, driver ICs, and some analog chips, while Wi-Fi 7 and AI PCs drive high-end spec upgrades, shifting pricing leverage from buyers to suppliers.

2.1.13 Yangjie Technology: Second Price Hike in 2026; EU Supply Continuity Secured

On June 23, Yangjie Technology, a China-based power device IDM, issued its second price hike notice in 2026, raising all products (diodes/thyristors/MOSFETs/IGBTs/SiC) by 10%–15%, effective July 1. The company cited continued price increases in wafers, metals, and packaging materials, with cost pressures exceeding expectations in 2H. Notably, after being placed on an EU list in April, Yangjie received a 9-month transition period (until March 16, 2027) from the EU Council following joint appeals from European customers, allowing continued procurement – reflecting European automakers' heavy reliance on Chinese power device supply with limited alternatives. In the market, AI server power supply capacity has jumped from 800W to over 5.5kW, raising power device value per server from USD 6–7 to USD 30–50, directly boosting MOSFET, IGBT, and SiC demand. Yangjie's captive wafer capacity ensures better supply assurance in tight cycles, and this hike not only eases cost pressure but also strengthens its position in automotive, industrial, and AI power markets.

2.1.14 TSMC / NVIDIA: GTC Taipei Announces Deep AI Collaboration; Huang Attends COMPUTEX

On June 1, TSMC and NVIDIA announced a milestone collaboration at GTC Taipei, integrating NVIDIA's accelerated computing and AI technologies into TSMC's fabs – from computational lithography, transistor simulation, defect inspection, to factory operations – to boost manufacturing efficiency and yield. Using NVIDIA CUDA-X, PhysicsNeMo, Omniverse, and cuOpt, TSMC accelerates simulation, lithography, and digital twin-based factory automation; lithography costs are expected to drop 50%. TSMC's 3nm capacity remains fully loaded despite expanding from 130k to 160k–175k wafers per month, unable to meet orders from NVIDIA, AMD, Google, and AWS; price hikes are expected through 2H2026 into 2027. NVIDIA CEO Jensen Huang attended COMPUTEX 2026 and GTC Taipei, publicly stating Marvell could become the next trillion-dollar company, sending Marvell shares up over 25% pre-market. Earlier, after meeting SK Group Chairman Chey Tae-won in Seoul, Huang confirmed that NVIDIA's upcoming Vera CPU will use SK Hynix memory. These moves reinforce the "AI semiconductor triangle alliance" (NVIDIA, SK Hynix, TSMC) and signal NVIDIA extending from AI chip design to core semiconductor manufacturing, building a closed-loop ecosystem where AI designs chips that run AI.

2.1.15 Foundry Industry: Entering Full Pricing Uptrend

TrendForce reported on June 8 that TSMC, UMC, VIS, and Powerchip are implementing price hikes from 2H2026 due to tight capacity, with increases likely extending into 2027 – signaling a full uptrend in foundry quotes. UMC CFO Liu Chi-tung stated at the shareholders' meeting that UMC plans targeted hikes in 2H and broad negotiations in 2027; UMC shares hit a 26-year high of NT$170. VIS Chairman Fang Lue noted that price hikes have been announced and broadly accepted by customers, with pricing support expected in 2H. Tight mature-node capacity and rising production costs are fundamental drivers of downstream chip price increases.

03

Application Updates

3. Application Updates Overview

Category	Updates	Insight
Artificial Intelligence	Meta is exploring raising tens of billions of dollars to fund the expansion of its AI infrastructure, supporting its long-term AI development strategy.	Continued investment in AI infrastructure could reinforce demand for AI servers, enterprise storage, high-speed networking equipment and high-performance memory.
Artificial Intelligence	Amazon Web Services (AWS) announced an additional US$13 billion investment to expand AI and cloud infrastructure in India.	Expanding hyperscale cloud infrastructure is expected to support procurement of AI servers, enterprise SSDs, DDR5 memory, networking equipment and power infrastructure.
Artificial Intelligence	Tencent placed a long-term server DRAM order worth more than RMB20 billion (US$3 billion) with ChangXin Memory Technologies (CXMT) to support its expanding cloud computing and AI infrastructure.	Rising AI computing demand may strengthen procurement of enterprise memory, AI servers, storage systems and cloud infrastructure supporting large-scale AI deployment.
Automotive	BMW Group expanded its collaboration with Figure AI by introducing the Figure 03 humanoid robot into production activities at its Spartanburg plant.	Continued EV manufacturing investment may support demand for automotive MCUs, battery management ICs, SiC power devices, automotive memory and sensors.
Automotive	BYD aims to become the world's largest automaker within five years through continued global expansion and EV production growth.	The company's long-term growth strategy could reinforce demand for automotive MCUs, power semiconductors, battery management ICs and vehicle connectivity solutions.
Automotive	Jeep unveiled plans to expand its European lineup to six models by 2030, including new hybrid and electric vehicles to strengthen its regional market presence.	The expanded electrification roadmap may support long-term demand for automotive MCUs, battery management ICs, power semiconductors, vehicle connectivity modules and automotive memory.

Category	Update	Insight
Industrial	Honeywell announced plans to pursue US$2–4 billion in acquisitions, with industrial automation identified as a key investment focus following its corporate restructuring.	Continued investment in industrial automation could strengthen demand for industrial controllers, PLCs, sensors, power electronics and factory automation systems.
Industrial	Schneider Electric agreed to acquire industrial AI software company Cognite for approximately US$3.1 billion, strengthening its industrial digitalization portfolio.	The acquisition reinforces industrial AI adoption and may drive demand for industrial networking, edge computing, automation controllers and intelligent sensing technologies.
Industrial	Accenture expanded its collaboration with Siemens to accelerate software-defined manufacturing and industrial AI adoption for global manufacturers.	Greater adoption of industrial software and AI is likely to support demand for industrial PCs, connectivity modules, embedded processors and automation infrastructure.
Industrial	Siemens introduced new enhancements to its industrial software portfolio to accelerate software-defined automation and AI-driven engineering.	Continued digital transformation across manufacturing may create additional opportunities for industrial controllers, edge computing, sensors and industrial communication modules.
Robotics	Apptronik launched its new Robot Park and unveiled the Apollo 2 humanoid robot to accelerate real-world workforce training and commercial deployment.	The expansion of humanoid robot training and deployment infrastructure could accelerate demand for embedded computing, vision systems, motion controllers, sensors and industrial-grade memory.
Robotics	Unitree Robotics advanced its IPO plans while continuing to scale humanoid robot production, reflecting growing momentum in the commercial robotics market despite increasing competition.	Continued investment in humanoid robot manufacturing may support demand for motion-control ICs, embedded processors, machine vision systems, industrial memory and precision sensors as commercialization accelerates.
Robotics	Agility Robotics agreed to go public through a SPAC merger, supporting the company's next phase of commercial expansion and manufacturing scale-up.	Increased funding and commercialization efforts may drive procurement of servo drives, embedded processors, machine vision systems, industrial memory and power management components

3.1 Artificial Intelligence

3.1.1 Meta Explores New Funding for AI Infrastructure Expansion

Meta is exploring raising tens of billions of dollars to finance the expansion of its AI infrastructure, supporting future investments in data centres and AI computing capacity. The initiative reflects the company's continued commitment to strengthening its AI capabilities as competition among hyperscalers intensifies. The planned investment could reinforce demand for AI servers, enterprise storage, high-speed networking equipment and high-performance memory, supporting the continued expansion of AI infrastructure.

3.1.2 AWS Expands AI and Cloud Infrastructure Investment in India

Amazon Web Services (AWS) announced an additional US$13 billion investment to expand its AI and cloud infrastructure in India. The investment aims to strengthen regional cloud capacity while supporting increasing enterprise adoption of AI services across the country. Growing hyperscale cloud investment is expected to support demand for AI servers, enterprise SSDs, DDR5 memory, networking equipment and power infrastructure, as cloud providers continue expanding AI-ready capacity.

3.1.3 Tencent Places RMB20 Billion DRAM Order with CXMT

Tencent placed a long-term server DRAM order worth more than RMB20 billion (approximately US$3 billion) with ChangXin Memory Technologies (CXMT) to support the rapid expansion of its cloud computing and AI infrastructure. The agreement reflects Tencent's increasing demand for high-performance memory while strengthening collaboration with China's domestic memory supplier. The sizeable procurement highlights growing investment in AI infrastructure and cloud services. As hyperscale cloud providers continue expanding AI capabilities, demand for enterprise DRAM, AI servers, high-performance storage and networking infrastructure is expected to remain resilient.

3.2 Automotive

3.2.1 BMW Completes US$1.7 Billion EV Production Investment in the U.S.

BMW completed a US$1.7 billion investment in its South Carolina facilities to prepare for fully electric vehicle production in the U.S. The investment strengthens BMW's EV manufacturing footprint and supports future production of next-generation electric vehicles for the North American market. The expansion is expected to increase demand for automotive MCUs, SiC and IGBT power devices, battery management ICs, automotive memory, sensors, MLCCs and power inductors. As EV production scales up, demand for automotive-grade electronic components is expected to remain strong.

3.2.2 BYD Targets World's Largest Automaker Position

BYD announced its ambition to become the world's largest automaker within the next five years, supported by continued overseas expansion and increasing EV production. The strategy demonstrates the company's confidence in long-term global demand for electric vehicles. Continued production growth could reinforce demand for automotive MCUs, battery management ICs, power semiconductors, vehicle connectivity modules and automotive-grade memory across the EV supply chain.

3.2.3 Jeep Expands European Electrification Strategy

Jeep announced plans to expand its European lineup to six models by 2030, including new hybrid and battery electric vehicles. The strategy is designed to strengthen Jeep's presence in Europe while supporting Stellantis' broader electrification roadmap and addressing changing consumer demand across the region. The expanded vehicle roadmap reinforces the industry's long-term commitment to electrification. Continued rollout of hybrid and electric vehicle platforms may support demand for automotive MCUs, battery management ICs, power semiconductors, vehicle connectivity modules and automotive memory, creating additional opportunities across the automotive electronics supply chain.

3.3 Industrial

3.3.1 Honeywell Targets Industrial Automation Acquisitions

Honeywell announced plans to pursue between US$2 billion and US$4 billion in acquisitions, identifying industrial automation as one of its key investment priorities following its planned corporate restructuring. The company aims to strengthen its automation portfolio as manufacturers continue accelerating digital transformation and smart factory investments. The strategy highlights continued confidence in industrial automation despite an uncertain macroeconomic environment. Increased investment in automation technologies could support demand for industrial controllers, PLCs, sensors, power electronics and factory automation equipment.

3.3.2 Schneider Electric to Acquire Cognite for US$3.1 Billion

Schneider Electric agreed to acquire industrial AI software company Cognite for approximately US$3.1 billion, strengthening its capabilities in industrial data management, digital twins and AI-driven automation. The acquisition expands Schneider Electric's software portfolio and supports its long-term industrial digitalization strategy. The move reinforces growing adoption of Industrial AI across manufacturing and energy sectors. This could drive additional demand for industrial networking, edge computing, automation controllers, sensors and intelligent monitoring systems supporting smart factory applications.

3.3.3 Accenture Expands Industrial AI Collaboration with Siemens

Accenture expanded its collaboration with Siemens to help manufacturers accelerate software-defined manufacturing and industrial AI adoption. The partnership combines Siemens' industrial software with Accenture's digital engineering expertise to improve operational efficiency and factory productivity. Growing adoption of software-defined manufacturing is expected to encourage investment in industrial PCs, embedded processors, connectivity modules, automation platforms and factory communication infrastructure.

3.3.4 Siemens Advances Software-Defined Industrial Automation

Siemens introduced new enhancements across its industrial software portfolio to support software-defined automation, AI assisted engineering and IT/OT integration. The updates are designed to help manufacturers improve engineering efficiency while accelerating digital transformation initiatives. The continued evolution of software-driven manufacturing may create additional demand for industrial controllers, edge computing platforms, industrial communication modules, sensors and automation-related electronic components.

3.4 Robotics

3.4.1 Apptronik Launches Robot Park and Apollo 2 Humanoid Robot

Apptronik launched its 90,000-square-foot Robot Park and introduced the Apollo 2 humanoid robot, aiming to accelerate robot training and prepare humanoid robots for commercial deployment across manufacturing, logistics and warehouse operations. The new facility enables robots to be trained in realistic industrial environments before customer deployment. The investment highlights growing confidence in commercial humanoid robotics beyond prototype development. As deployment expands, demand could gradually increase for embedded computing platforms, vision systems, motion controllers, industrial sensors, high-performance processors and industrial-grade memory used in next-generation robots.

3.4.2 Unitree Robotics Advances IPO Plans Amid Commercialization Push

Unitree Robotics continued advancing its IPO plans while expanding humanoid robot production, reflecting growing investor interest in China's robotics industry. Despite increasing competition and commercialization challenges, the company remains focused on scaling manufacturing capabilities and strengthening its position in the rapidly evolving humanoid robotics market. The development highlights continued investment in commercial robotics and is likely to support demand for motion-control ICs, embedded processors, machine vision systems, industrial memory and precision sensors, as manufacturers accelerate production of next-generation humanoid robots.

3.4.3 Agility Robotics to Go Public Through SPAC Merger

Agility Robotics announced plans to become a publicly listed company through a SPAC merger, valuing the humanoid robotics company at approximately US$2.5 billion. The transaction is expected to provide additional capital to accelerate commercial deployment, manufacturing expansion and product development as demand for humanoid robots continues to grow. The listing highlights increasing investor confidence in the commercial potential of humanoid robotics. Additional funding could accelerate demand for servo drives, embedded processors, machine vision systems, industrial memory, motion-control electronics and power management components as production capacity continues to expand.

04

Memory Market Trends

4. Memory Market Trends

4.1 Memory Market Overview

- **DDR4**: Supply remains tight, with prices at elevated levels and a stable-to-strong outlook.

- **DDR5**: Strong demand and limited supply have driven sharp contract price increases for months, with the market in shortage.

- **LPDDR5**: Prices remain high, pressuring the mobile segment.

- **NAND Flash**: Q2 contract prices are expected to rise sharply; NOR Flash and SLC NAND prices have more than doubled in 1H.

- **SSD**: Retail prices have surged since the start of the year; Kioxia launched high-end PCIe 5.0 products.

- **HDD**: Wholesale prices rose for the fifth consecutive quarter, with average prices doubling from baseline levels and no signs of slowing.

4.2 Spot Price Trends by Memory Brand

SAMSUNG (JUNE)

Category	Specification	Price Trend
DDR4 DRAM Chips	16Gb (1G*16)	Flat
DDR4 DRAM Chips	16Gb (2G*8)	+30.67%
DDR4 DRAM Chips	8Gb (512*16)	+30.00%
DDR4 DRAM Chips	8Gb (1G*8)	Flat
DDR4 DRAM Chips	4Gb (256*16)	+25.00%
DDR4 DRAM Chips	4Gb (512*8)	+21.43%
DDR4	64GB (Server)	Flat
DDR4	32GB (Server)	+10.00%
DDR4	16GB (Server)	Flat
DDR4	32GB (PC)	Flat
DDR4	16GB (PC)	Flat
DDR4	8GB (PC)	-5.56%
DDR4	4GB (PC)	Flat

Category	Specification	Price Trend
DDR5	96GB (Server)	Flat
DDR5	64GB (Server)	+28.00%
DDR5	32GB (Server)	+33.33%
DDR5	16GB (Server)	+15.38%
DDR5	32GB (PC)	-4.44%
DDR5	16GB (PC)	Flat
DDR5	8GB (PC)	+6.67%
SSD	7680GB/7.68TB（Enterprise）	Flat
SSD	3840GB/3.84TB（Enterprise）	Flat
SSD	1920GB/1.92TB（Enterprise）	Flat
SSD	960GB/1TB（Enterprise）	Flat
SSD	480GB（Enterprise）	Flat
SSD	240GB（Enterprise）	Flat
SSD	2TB（Consumer）	Flat
SSD	1TB（Consumer）	Flat
SSD	512GB（Consumer）	Flat

Category	Specification Model	Price Trend
NAND flash	1Gb-SLC	+3.82%
NAND flash	2Gb-SLC	+2.50%
NAND flash	4Gb-SLC	+15.38%
NAND flash	8Gb-SLC	+7.04%
NAND flash	16Gb-SLC	+29.63%

SK HYNIX (JUNE)

Category	Specification Model	Price Trend
DDR4 DRAM Chips	16Gb (1G*16)	+16.67%
DDR4 DRAM Chips	16Gb (2G*8)	+53.85%
DDR4 DRAM Chips	8Gb(512*16)	+52.17%
DDR4 DRAM Chips	8Gb (1G*8)	Flat
DDR4 DRAM Chips	4Gb (256*16)	+55.56%
DDR4	64GB (Server)	Flat
DDR4	32GB (Server)	Flat
DDR4	16GB (Server)	Flat
DDR4	32GB (PC)	Flat
DDR4	16GB (PC)	Flat
DDR4	8GB (PC)	Flat
DDR4	4GB (PC)	Flat

Category	Specification	Price Trend
DDR5	96GB (Server)	+2.56%
DDR2	64GB (Server)	+28.00%
DDR5	32GB (Server)	+33.33%
DDR5	16GB (Server)	+15.38%
DDR5	32GB (PC)	Flat
DDR5	16GB (PC)	Flat
DDR5	8GB (PC)	Flat

Category	Specification	Price Trend
NAND flash	1Gb-SLC	+3.03%
NAND flash	2Gb-SLC	+4.17%
NAND flash	4Gb-SLC	+6.15%

MICRON (JUNE)

Category	Specification	Price Trend
DDR4 DRAM Chips	6Gb (1G*16)	+7.69%
DDR4 DRAM Chips	16Gb (2G*8)	+32.00%
DDR4 DRAM Chips	8Gb (512*16)	+75.00%
DDR4 DRAM Chips	8Gb (1G*8)	+27.27%
DDR4	64GB (Server)	Flat
DDR4	32GB (Server)	Flat
DDR4	16GB (Server)	Flat
DDR4	32GB (PC)	Flat
DDR4	16GB (PC)	Flat
DDR4	8GB (PC)	Flat
DDR4	4GB (PC)	Flat

Category	Specification	Price Trend
DDR5	96GB (Server)	Flat
DDR5	64GB (Server)	+8.70%
DDR5	32GB (Server)	Flat
DDR5	16GB (Server)	Flat
DDR5	32GB (PC)	Flat
DDR5	16GB (PC)	Flat
DDR5	8GB (PC)	Flat
SSD	7680GB/7.68TB（Enterprise）	Flat
SSD	3840GB/3.84TB（Enterprise）	Flat
SSD	1920GB/1.92TB（Enterprise）	Flat
SSD	960GB/1TB（Enterprise）	Flat
SSD	480GB（Enterprise）	+30.00%
SSD	240GB（Enterprise）	+39.39%

Category	Specification	Price Trend
NAND flash	1Gb-SLC	+4.55%
NAND flash	2Gb-SLC	+4.29%
NAND flash	4Gb-SLC	+12.90%
NAND flash	8Gb-SLC	+5.00%

NANYA (JUNE)

Category	Specification	Price Trend
DDR4 DRAM Chips	8Gb(512*16)	+66.67%
DDR4 DRAM Chips	8Gb(1G*8)	+38.30%
DDR4 DRAM Chips	4Gb(256*16)	+27.27%

KIOXIA (JUNE)

Category	Specification	Price Trend
NAND flash	1Gb-SLC	-2.35%
NAND flash	2Gb-SLC	+6.67%
NAND flash	4Gb-SLC	+15.15%
NAND flash	8Gb-SLC	+4.84%
NAND flash	16Gb-SLC	+23.21%

MXIC (JUNE)

Category	Specification	Price Trend
NAND flash	1Gb-SLC	+12.50%
NAND flash	2Gb-SLC	+4.62%
NAND flash	4Gb-SLC	+11.11%

WINBOND (JUNE)

Category	Specification	Price Trend
NAND flash	1Gb-SLC	+31.25%
NAND flash	2Gb-SLC	+30.77%
NAND flash	4Gb-SLC	+47.73%

CRUCIAL (JUNE)

Category	Specification	Price Trend
DDR4	32GB (PC)	-16.67%
DDR4	16GB (PC)	-5.88%
DDR4	8GB (PC)	Flat
DDR5	32GB (PC)	-5.00%
DDR5	16GB (PC)	-13.04%
DDR5	8GB (PC)	Flat

KINGSTON (JUNE)

Category	Specification	Price Trend
DDR4	64GB (Server)	+10.76%
DDR4	32GB (Server)	+28.57%
DDR4	16GB (Server)	+10.94%
DDR4	32GB (PC)	+5.48%
DDR4	16GB (PC)	Flat
DDR4	8GB (PC)	Flat
DDR5	96GB (Server)	+2.27%
DDR5	64GB (Server)	+4.44%
DDR5	32GB (Server)	+9.26%
DDR5	16GB (Server)	+10.34%
DDR5	32GB (PC)	+5.00%
DDR5	16GB (PC)	+4.35%
DDR5	8GB (PC)	+26.09%

WESTERN DIGITAL (JUNE)

Category	Specification	Price Trend
HDD	24TB	Flat
HDD	20TB	Flat
HDD	18TB	Flat
HDD	16TB	Flat
HDD	8TB	Flat

SEAGATE (JUNE)

Category	Specification	Price Trend
HDD	24TB	Flat
HDD	20TB	Flat
HDD	18TB	Flat
HDD	16TB	Flat
HDD	8TB	Flat

TOSHIBA (JUNE)

Category	Specification	Price Trend
HDD	24TB	Flat
HDD	20TB	Flat
HDD	18TB	Flat
HDD	16TB	Flat
HDD	8TB	Flat

Pricing data as of June 2026. Prices may fluctuate significantly due to market supply and demand; price trends are for reference only.

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