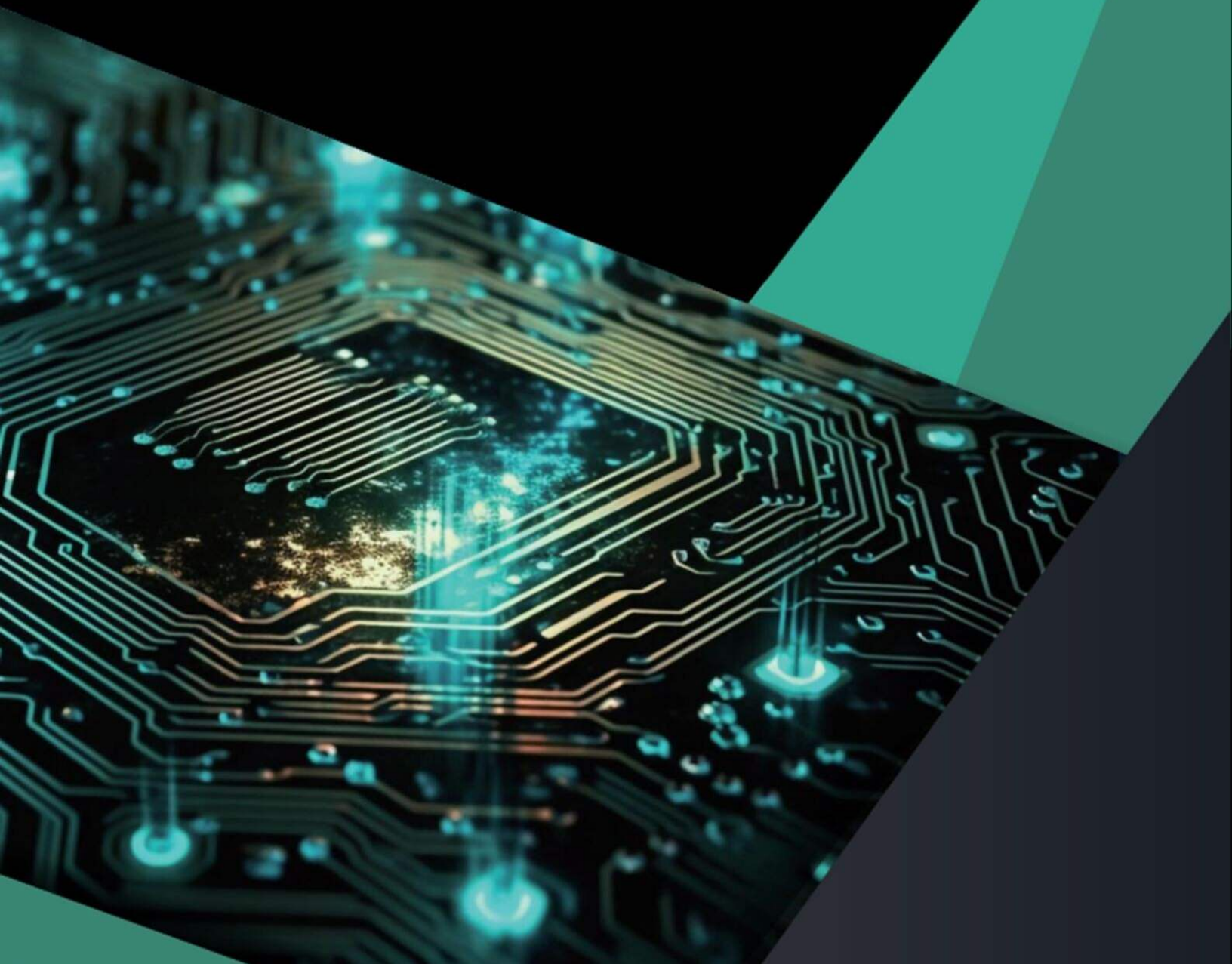


July 2026

Monthly Market Research

Your AI-powered partner for global sourcing



About Briocan

Established in 2008 and headquartered in Singapore, Briocan 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 m² 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	- Middle East: U.S.–Iran Ceasefire Collapse and “Dual Strait” Disruptions Threaten Global Semiconductor Supply Chains - U.S.: New Section 301 Tariffs on 60 Trading Partners, Semiconductor Devices Explicitly Exempted - U.S.: CHIPS Act Subsidies Accelerate Deployment, Bosch Secures USD 225 Million Award and TSMC Adds USD 100 Billion Investment - Japan: M7.1 Kumamoto Quake Rocks "Silicon Island"; Multiple Semiconductor Plants Suspended for Inspection - China: Export Control Framework Expands with Helium Restrictions, AI Technology Tightening, and EU Countermeasures
Industry	- Samsung Electronics: Q2 Operating Profit Jumps 1,814%; DS Division Accounts for 99.7% of Group Profit; MLCC/DRAM/Foundry Prices Rise - SK Hynix: Q2 Results Hit Records but Miss Estimates; HBM4 in Production; LTAs and Customer Deposits Reshape Memory Supply Chain - Micron: Tight DRAM/NAND Supply, Strong HBM and Enterprise SSD Demand - Nanya Technology: Q2 Net Profit Surges 1,324%, Gross Margin of 79.5% Surpasses TSMC - TSMC: Breaks “No Hike” Convention, Raises Prices 5–10% in July and Again in 2027 - NVIDIA: GPU Supply Constraints Drive 50%+ Price Surge in High-End Professional GPUs, with 12–18 Month Lead Times - AMD: Helios Enters Full Production, MI455X Directly Challenges NVIDIA - Broadcom: AI Demand Absorbs Traditional Capacity, Driving Structural Surge in PCIe and Networking Chips - Intel: Q2 Revenue Achieves Fastest Growth in Nearly 15 Years, Data Center Revenue Surges 59% - Qualcomm: Double-Digit Price Increase from September, Flagship Chip Costs Exceed USD 300 - STMicroelectronics: Q2 Beats Estimates; Dual-Engine Driven by General-Purpose MCU and AI Data Center - Texas Instruments: Q2 Broadly Outperforms, Supported by Strong Growth Across Three Key Markets - Renesas: July Price Increase Takes Effect, Creating Polarization in the Spot Market

Category	Trend
End-market (Artificial Intelligence)	- Anthropic, OpenAI & AMD Lock In Long-Term AI Compute - Nvidia Supports Proposed 10GW Ohio AI Data Centre Project
End-market (Automotive)	- Ford & GM Lock in Micron Long-Term Deals - Mobileye ADAS for Stellantis, REM Covers 95%+ US & EU Roads
End-market (Healthcare)	- ADI Warns of Medical Analog Chip Supply Risks - North American Medical Semiconductor Market Faces Import Concentration
End-market (Industrial)	- Swiss Industrial OEMs Shift Towards AI Accelerator Chips - ADI & TI Shift Industrial Analog Capacity Towards AI; Legacy Logic Enters EOL
End-market (Robotics)	- Unitree Launches H1 Pro Across Europe Following Shanghai IPO Approval - Foundation Selects AMD Ryzen AI Embedded X100 for Phantom Humanoid Robot - AgiBot Expands Domestic Semiconductor Adoption
Memory Market Trends	- DRAM: Q3 Contract Prices Expected to Rise 13–18% Due to Widening Supply-Demand Gap - DDR4 : Supply Tightening Pushes Prices Higher, Though Some Spot Prices Are Easing - DDR5: Rising Chip Costs and Cloud Demand Keep Prices Elevated - NAND Flash: Q3 Contract Prices Expected to Increase 10–15%, Limited by Slower Consumer Demand

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01

Macro Environment Updates

1. Macro Environment

1.1 Industry Policy

1.1.1 Middle East: U.S.–Iran Ceasefire Collapse and “Dual Strait” Disruptions Threaten Global Semiconductor Supply Chains

In early July, the U.S.–Iran memorandum of understanding signed in June effectively collapsed, followed by consecutive U.S. airstrikes on Iran. On July 12, Iran's Islamic Revolutionary Guard Corps announced the closure of the Strait of Hormuz. In the week ending July 20, vessel traffic through the strait plunged 66%, with only one oil tanker passing on July 23, the lowest level since May. Meanwhile, Yemen's Houthi forces announced a maritime embargo on Saudi Arabia on July 20 and attacked multiple Saudi oil tankers in the Red Sea, reducing traffic through the Bab el-Mandeb Strait by nearly 50%. The simultaneous disruption of two critical energy chokepoints poses severe challenges to global crude oil and commodity supply chains. For the semiconductor industry, Qatar supplies approximately one-third of global helium, with exports heavily dependent on the Strait of Hormuz. Helium is essential for wafer cooling, lithography, and leak detection. As of the week ending July 10, spot helium prices had at least doubled since March; China's helium import dependency reached 84%, with imports mainly from Qatar (54%) and Russia (44%). Amid escalating geopolitical risks, the Philadelphia Semiconductor Index fell more than 17% in July and officially entered a technical bear market on July 17, declining over 20% from its record high on June 22, as geopolitical conflicts, rising energy costs, and supply chain uncertainty continued to pressure semiconductor valuations.

1.1.2 U.S.: New Section 301 Tariffs on 60 Trading Partners, Semiconductor Devices Explicitly Exempted

On July 23, the U.S. Trade Representative (USTR) issued a formal notice under Section 301 of the Trade Act of 1974, imposing additional tariffs of 10% to 12.5% on 60 countries and regions over alleged “forced labor” concerns, replacing the 10% global temporary import tariff expiring on July 24. The new tariffs took effect at 00:01 EDT on July 24, covering approximately 99.4% of U.S. imports across four tariff categories. Specifically, China, Hong Kong, Vietnam, Australia, and 35 other economies face direct 12.5% tariffs; Japan, South Korea, and Switzerland will be charged up to the MFN tariff rate of 12.5%; the EU and Taiwan, China will be adjusted up to the MFN rate of 10%; while the U.K., India, Canada, and 14 other economies face direct 10% tariffs. For industry impact, semiconductor devices already subject to Section 232 tariffs are explicitly exempted from the new tariffs. Section 301 and Section 232 tariffs will not be stacked, but the new tariffs will apply in addition to existing China-specific Section 301 tariffs. Goods shipped before July 24 and cleared before July 28 are exempt. The U.S. is also advancing overcapacity investigations targeting 16 economies, potentially leading to additional sector-specific tariffs. The announcement triggered opposition from multiple countries: China’s Ministry of Foreign Affairs opposed unilateral tariff measures, stating tariff wars serve no party’s interests; Japan expressed “deep regret”; Australia called the move “unjustified”; while the EU responded relatively moderately due to the 15% tariff cap secured under the U.S.–EU trade agreement effective July 1.

1.1.3 U.S.: CHIPS Act Subsidies Accelerate Deployment, Bosch Secures USD 225 Million Award and TSMC Adds USD 100 Billion Investment

On July 13, the U.S. Department of Commerce and Bosch signed a USD 225 million CHIPS Act final funding agreement to support Bosch’s USD 2 billion investment in upgrading its California facility into an 8-inch silicon carbide production base. On the same day, President Trump signed an announcement granting chemical companies in the semiconductor, healthcare, and advanced manufacturing sectors a two-year exemption from HON Rule compliance requirements to secure critical chemical supplies. On July 16, TSMC announced an additional USD 100 billion investment in the U.S. to build four more wafer fabs for 2nm and below processes, along with advanced packaging facilities, bringing total investment to USD 265 billion. Government subsidies and corporate investments are jointly driving semiconductor localization, expanding policy focus from advanced manufacturing to materials security, packaging capacity, and full supply chain development. On July 15, the U.S. International Trade Commission (ITC) launched a second Section 337 DRAM-related

investigation (Investigation No. 337-TA-1511) involving Samsung, Google, NVIDIA, Broadcom, and others following Netlist's patent infringement claims related to HBM and DDR5, highlighting rising IP protection efforts in the memory sector. On July 22, SEMI led semiconductor executives to Capitol Hill to urge an extension of the Section 48D Advanced Manufacturing Investment Credit (AMIC). The 35% tax credit has driven hundreds of billions of dollars in investments across 28 U.S. states, but SEMI warned that the December 31, 2026 construction deadline is misaligned with the multi-year development cycles of semiconductor facilities.

1.1.4 Japan: M7.1 Kumamoto Quake Rocks "Silicon Island"; Multiple Semiconductor Plants Suspended for Inspection

At 4:27 p.m. on July 28, a shallow M7.1 strike-slip earthquake struck Kumamoto Prefecture at a depth of ~10 km, with a maximum seismic intensity of 7 and a measured intensity of 5+ in Kikuyo-machi. The quake killed 14 and injured dozens. Kyushu accounts for 56.3% of Japan's semiconductor production value, hosting TSMC's JASM, Sony, Renesas, Tokyo Electron Kyushu, and Mitsubishi Electric. Post-quake, multiple firms activated emergency protocols and suspended operations: TSMC's JASM Fab 1 (28/22nm, 16/12nm, ~20k wafers/mo) halted production; utilities and raw materials are intact, but equipment inspection and calibration will take time. Construction of the second fab, temporarily halted, has resumed. TSMC's Japan fab represents <3% of total capacity, with limited overall impact. Sony's Kumamoto Technology Center – the world's largest CMOS image sensor plant (53% global share) – plans a phased restart from Aug 4, with full capacity expected by mid-Aug. Renesas' Nishiki Factory (ceiling/wall damage) resumed production on July 29 evening; its Kawashiri Factory (wall cracks, water leaks, pure water supply interruption) is scheduled for a phased restart from Aug 5. Tokyo Electron Kyushu Limited's two facilities (coaters/developers, cleaning, 3D packaging) sustained no major damage and resumed full operations on Aug 3. Mitsubishi Electric's Kumamoto Works (power semiconductors) restarted equipment on July 30 afternoon. On logistics, Yatsushiro Port – the only southern Kyushu port handling hazardous semiconductor materials – has experienced soil liquefaction and subsidence. Industry views the stoppages as 3–7 day preventive inspections; near-term automotive mature chip quotes may see a temporary 5–15% uptick. Longer-term, the quake exposes risks of regional industrial concentration, likely accelerating global supply chain diversification.

1.1.5 China: Export Control Framework Expands with Helium Restrictions, AI Technology Tightening, and EU Countermeasures

In July, China intensified semiconductor-related export controls, shifting from individual restrictions toward a more systematic framework. On the raw material front, China's Ministry of Commerce and General Administration of Customs issued Announcement No. 29 of 2026 on July 10, imposing temporary export bans on helium (HS code: 2804290010). Helium is widely used in critical semiconductor manufacturing processes, including wafer cooling, lithography, and leak detection. On July 16, the Ministry of Commerce stated that the measure aims to safeguard domestic supply, complies with World Trade Organization (WTO) rules, and may be adjusted based on future supply and demand conditions. On regulatory controls, the Financial Times reported on July 21 that the Ministry of Commerce was in discussions with companies including Alibaba, ByteDance, and Zhipu AI to explore tighter export controls on AI and semiconductor technologies. Potential measures may include restrictions on the transfer of critical training data, model weight downloads, and overseas chip manufacturing services, with possible inclusion in the next revision of China's "Catalogue of Technologies Prohibited or Restricted from Export." On countermeasures, the Ministry of Commerce announced on July 24 that 14 EU entities had been added to the export control list, representing a rapid response to the EU's July 23 decision to add 14 Chinese companies to its Russia-related sanctions list. The listed entities cover sectors including semiconductor material R&D, infrared detection, permanent magnet motors, and specialty chemicals. Overall, China is transitioning from responding to foreign export restrictions toward proactively establishing technology boundaries, advancing export control measures across three areas: critical materials, advanced AI technologies, and trade-related countermeasures.

02

Semiconductor Industry Updates

Semiconductor Industry Overview

Manufacturer	Category	Key Metrics	Trend
Samsung Electronics	Memory MLCC Foundry	OP KRW 89.49T (+1,814%) (approx. USD 68.8B), Net Profit KRW 71.27T (approx. USD 54.8B); DS division accounts for 99.7% of group profit; MLCC +30%, DRAM +20%	Triple growth across segments
SK Hynix	Memory	Rev KRW 79.32T (+257%) (approx. USD 61.0B), OP KRW 60.54T (+557%) (approx. USD 46.6B), Net Profit KRW 93.9T (+1,242%) (approx. USD 72.2B), including significant one-off investment gains; HBM4 mass production at HBM3E yield levels	LTA locked
Micron	Memory	DDR4 8Gb ~\$70, DDR3 4Gb >\$13; consumer-grade capacity constrained	Prices continue to rise
Nanya Technology	Memory	Q2 Rev TWD 82.5B (+684%) (approx. USD 2.58B), GM 79.5% above TSMC; ASP QoQ +60%	DRAM supercycle
TSMC	Foundry	3/5/7nm spot +5–10%, another +5–10% in 2027, HPC premium 10–15%	Breaking industry norms; shifting to seller-driven pricing
NVIDIA	GPU	RTX Pro 6000 +50%, lead time 12–18 months; high-end capacity prioritized for AI DC	High-end supply shortage
AMD	GPU AI	Helios 2.9 exaFLOPS; Anthropic 2GW deployment; AI TAM → \$2T	GW-scale challenge to NVIDIA
Broadcom	Networking PCI-E	PCI-E 5.0+ lead time >52 weeks; SS05 up 2–3×, BCM54616 up 10×	Structural surge
Intel	Server CPU	Q2 Rev USD 16.1B (+25%), DCAI USD 6.3B (+59%), fastest growth in 15 years	Demand exceeds supply

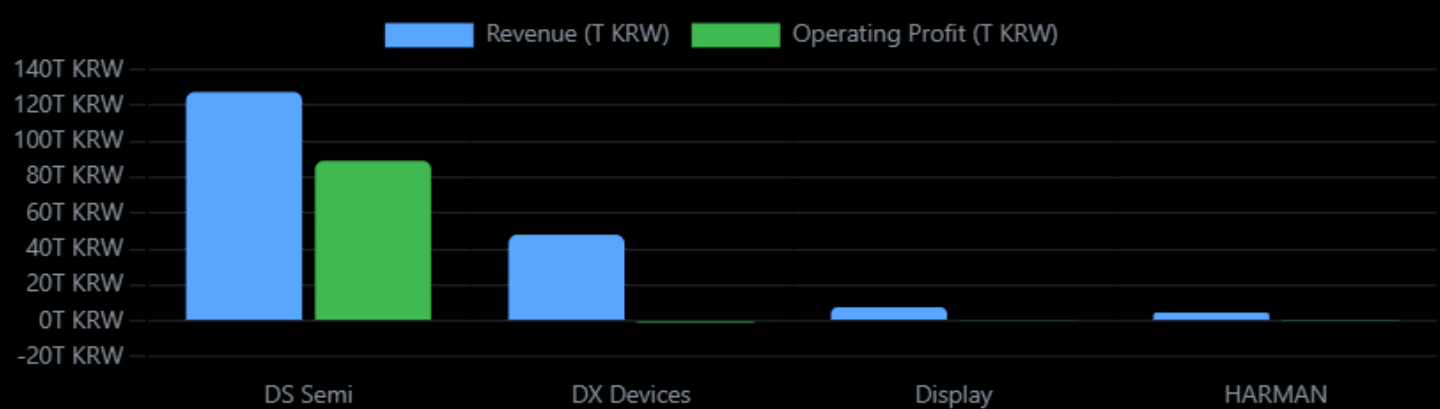
Semiconductor Industry Overview

Manufacturer	Category	Key Metrics	Trend
Qualcomm	Mobile SoC	Price increase >10% from Sept. 1; Snapdragon 8 Elite Gen 6 >USD 300; smartphone shipments -11%	Cost pass-through to end devices
STMicroelectronics (ST)	Analog MCU	Q2 revenue: USD 3.49 billion (+26%); MCU +35.5%; book-to-bill ~2; lead time extended from 30-52 weeks	Dual-engine driven
Texas Instruments (TI)	Analog	Q2 revenue: USD 5.463 billion (+23%); Industrial +30%; Data Center revenue doubled; guidance USD 5.65–6.15 billion	Broad-based outperformance
Renesas	MCU Automotive	All categories +8–15% (second time this year); automotive premium 15–30%, general-purpose prices down	Market polarization

2.1 Manufacturer Dynamics In-Depth Analysis

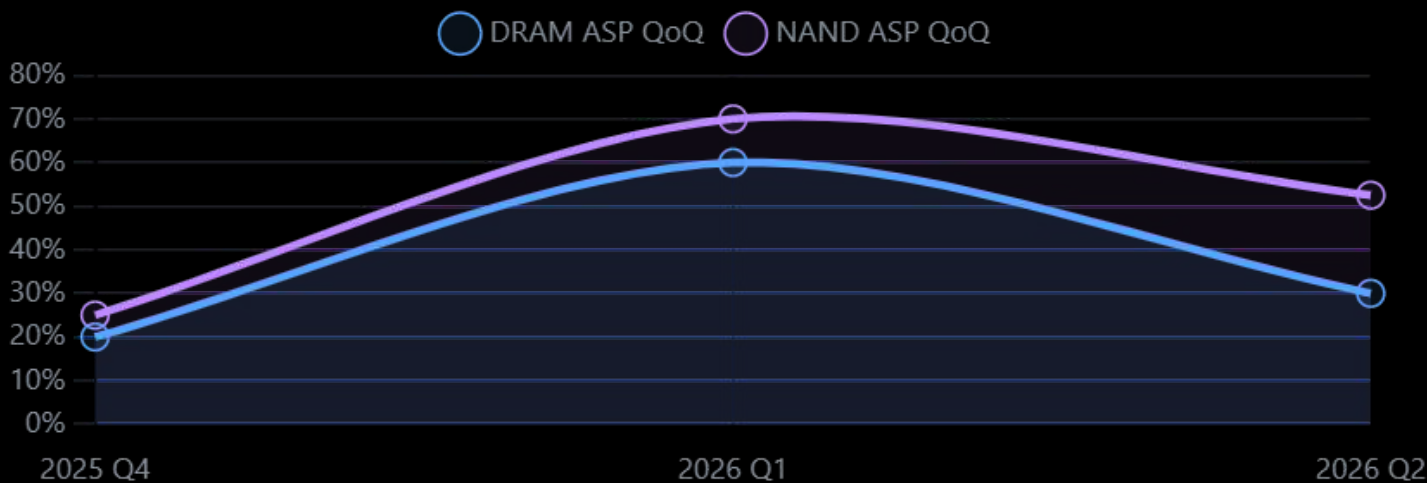
2.1.1 Samsung Electronics: Q2 Operating Profit Jumps 1,814%; DS Division Accounts for 99.7% of Group Profit; MLCC/DRAM/Foundry Prices Rise

On July 30, full Q2 results: revenue KRW 171.50T (+130%) (approx. USD 131.9B), OP KRW 89.49T (+1,814%) (approx. USD 68.8B), net profit KRW 71.27T (approx. USD 54.8B), beating expectations. The DS (semiconductor) division posted revenue KRW 127.5T (approx. USD 98.1B) and OP KRW 89.2T (approx. USD 68.6B), accounting for 99.7% of group profit – AI-driven DRAM and NAND bit shipments hit record highs, with server revenue share at a new peak. HBM4 customer verification nears completion; Q3 sales expected to more than triple QoQ, and HBM4 will account for >60% of total HBM mix in 2H. First HBM4E samples shipped to key customers, with 2027 supply discussions underway. On NAND, server SSDs represent >60% of NAND revenue (+20pp YoY); V10 V-NAND with triple-stack architecture is slated for August mass production. Price actions: MLCC +30% across all lines effective Aug 1; Q3 general-purpose DRAM targeted +20%; foundry 4/5/8nm +15% for new customers. On July 25, Samsung signed a USD 200B MOU with Broadcom through 2030. The DX (Device eXperience) division posted a loss of KRW 0.8T (approx. USD 0.6B), underscoring the widening divergence between AI semiconductors and consumer electronics. The stock has retreated over 40% from its June peak, reflecting market concerns over AI capex returns.



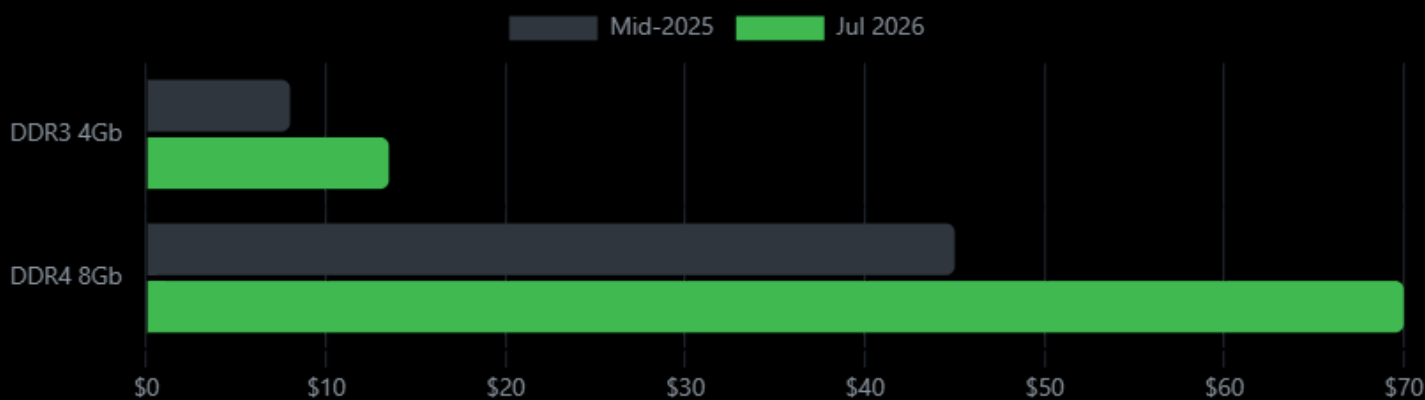
2.1.2 SK Hynix: Q2 Results Hit Records but Miss Estimates; HBM4 in Production; LTAs and Customer Deposits Reshape Memory Supply Chain

On July 29, Q2 earnings: revenue KRW 79.32T (+257%) (approx. USD 61.0B), OP KRW 60.54T (+557%) (approx. USD 46.6B), net profit KRW 93.9T (+1,242%, including significant one-off investment gains.) (approx. USD 72.2B) – all record highs but below analyst estimates (OP ~KRW 64T, approx. USD 49.2B), triggering a 14.65% single-day drop. The miss largely reflected more conservative pricing versus Samsung, particularly under LTAs, which limited upside from spot price gains. Operationally, HBM4 entered mass production in Q2 with yields at mature HBM3E levels; iHBM integrates cooling elements via hybrid bonding, cutting thermal resistance by 30%; 321-layer NAND accounts for the highest production share. Multi-year LTAs (with customer deposit mechanisms) have been finalized with ~10 core clients, covering ~50% of total capacity. CapEx was raised to the high-40T KRW range (approx. high-30B USD). On July 25, NVIDIA formally announced a multi-year AI memory supply agreement with SK Hynix, with a potential value of up to USD 500B.



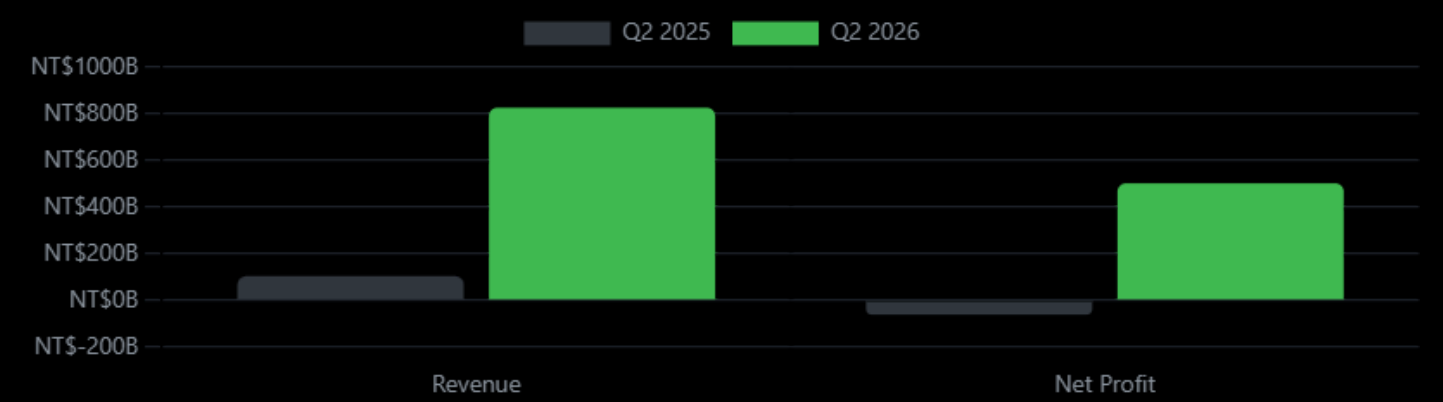
2.1.3 Micron: Tight DRAM/NAND Supply, Strong HBM and Enterprise SSD Demand

DDR4 8Gb prices reached approximately USD 70, while DDR3 4Gb exceeded USD 13. Strong demand for HBM and enterprise SSDs has squeezed consumer-grade capacity. Similar to Samsung and SK Hynix, Micron is prioritizing capacity allocation toward higher-margin AI server and HBM product lines, keeping consumer DRAM and NAND supply constrained. Although 1β DRAM and 232-layer NAND have entered mass production, the structural issue of capacity shifting toward high-end products is unlikely to ease in the near term.



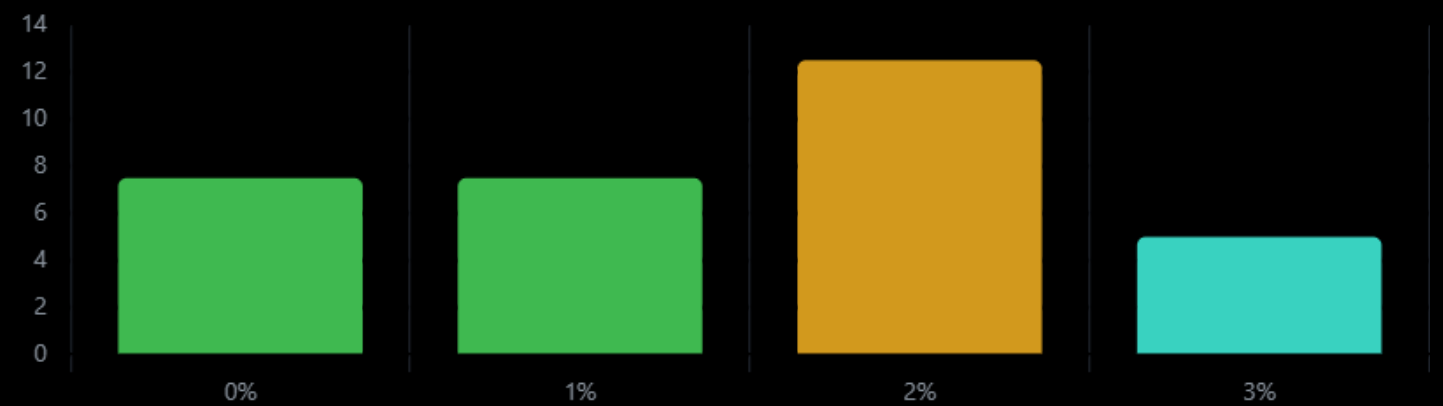
2.1.4 Nanya Technology: Q2 Net Profit Surges 1,324%, Gross Margin of 79.5% Surpasses TSMC

At its July 10 earnings briefing, Nanya Technology reported Q2 revenue of TWD 82.5 billion (≈USD 2.5 billion), up 684% YoY, with gross margin reaching a record high of 79.5%, surpassing TSMC. The sharp increase in DRAM ASP, up more than 60% QoQ, was the key driver behind the strong performance. General Manager Pei-Ying Lee stated that AI is driving structural growth in the memory industry, as AI demand consumes significant advanced capacity and squeezes traditional DRAM supply. Global DRAM undersupply is expected to continue through 2028. The company announced capital expenditure exceeding TWD 200 billion (≈USD 6.1 billion) in 2027 to build the new 5A fab and introduce 1C/1D process technology, targeting monthly wafer starts of 30,000 units by 2028, with LTAs covering 50% of total capacity. Nanya Technology's strong performance reflects the ongoing DRAM supercycle.



2.1.5 TSMC: Breaks “No Hike” Convention, Raises Prices 5–10% in July and Again in 2027

On July 10, TSMC notified NVIDIA, Apple, AMD, and others of 5–10% wafer price hikes for 3/5/7nm. Just 11 days later, it confirmed another 5–10% across-the-board increase for 2027, with a 10–15% premium on incremental HPC orders, covering 2nm to 28nm. The fundamental shift in pricing logic: AI-driven investment has made supply-demand imbalance – rather than process maturity – the primary driver, ushering in an era of foundry pricing power. Q2 net profit TWD 706.6B (+77%) (approx. USD 22.1B); NVIDIA expected to contribute ~USD 33B in 2026, or 22% of revenue; Apple A20 Pro per-chip cost may rise by \$10–20; 2nm wafer priced at ~\$30,000.



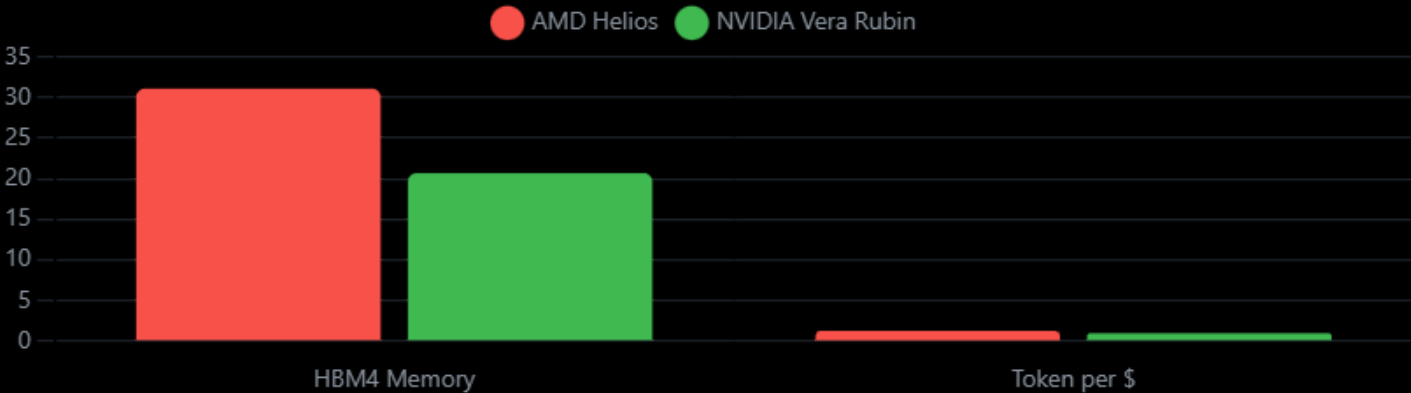
2.1.6 NVIDIA: GPU Supply Constraints Drive 50%+ Price Surge in High-End Professional GPUs, with 12–18 Month Lead Times

The RTX Pro 6000 has increased by more than 50%, with lead times extending to 12–18 months amid limited spot availability, driven by sustained demand for AI model training and professional rendering. In comparison, the RTX Pro 4000/5000 series saw more moderate increases of 8%–12%, with sufficient channel inventory. The key driver is NVIDIA’s prioritization of high-end GPU capacity for AI data centers, while supply of mid- and entry-level professional GPUs remains relatively adequate. The widening price gap and lead-time divergence between high-end professional GPUs and lower-tier products reflect how AI computing demand is reshaping GPU capacity allocation across the industry.



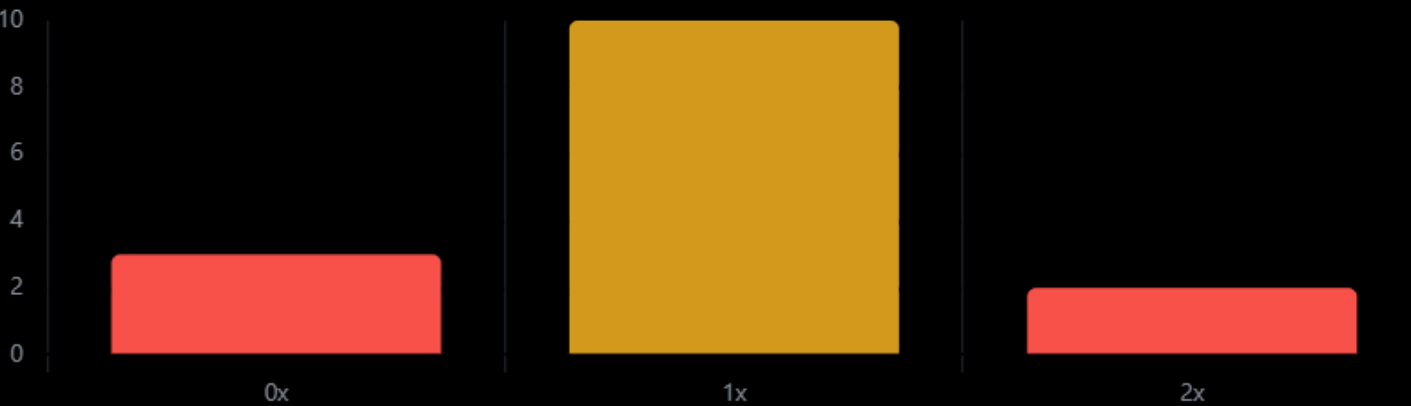
2.1.7 AMD: Helios Enters Full Production, MI455X Directly Challenges NVIDIA

On July 23, AMD launched the Helios platform, featuring 72 MI455X GPUs and 18 EPYC Venice CPUs per rack, delivering 2.9 exaFLOPS of computing performance with 31.1 TB of HBM4 memory, 30% higher token output efficiency per dollar, and 50% higher than NVIDIA Vera Rubin. On July 28, AMD announced a strategic partnership with Anthropic, under which Anthropic plans to deploy 2GW of MI455X capacity, while AMD committed up to USD 5 billion in strategic investment. CEO Lisa Su raised AMD’s 2030 AI TAM forecast to approximately USD 2 trillion. By leveraging an open ecosystem (UALink interconnect and open-source ROCm), AMD aims to challenge NVIDIA’s closed CUDA ecosystem and provide the market with a second gigawatt-scale AI computing platform. MI455X still relies on TSMC’s advanced packaging capacity, and its supply ramp-up remains a key factor to monitor.



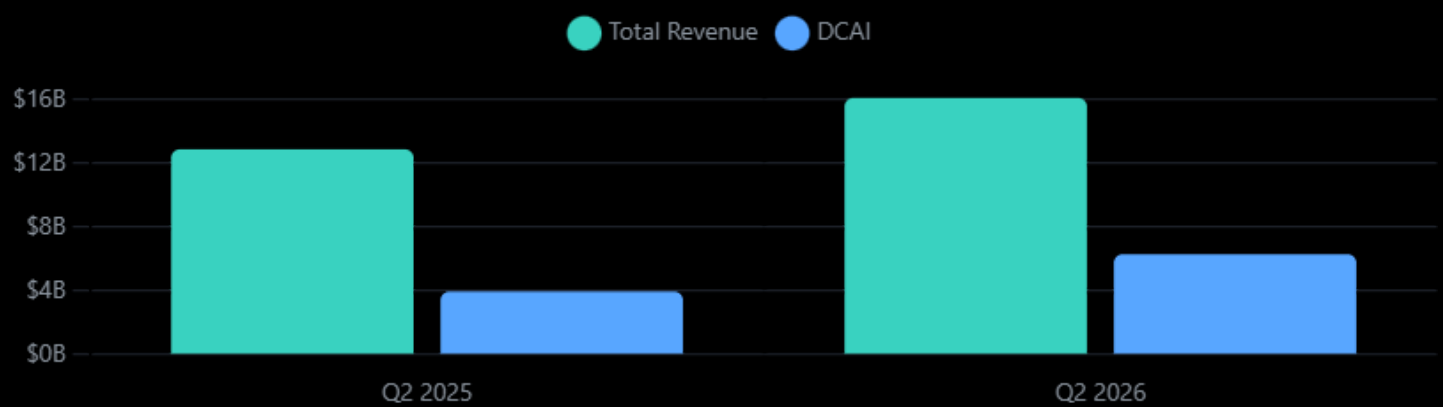
2.1.8 Broadcom: AI Demand Absorbs Traditional Capacity, Driving Structural Surge in PCIe and Networking Chips

Lead times for PCIe 5.0+ products (SS26 and SS24 series) have exceeded 52 weeks. SS05 pricing has increased by 2–3x, while BCM54616 prices surged 10x due to product discontinuation combined with AI-driven capacity constraints. Broadcom is showing a typical “dual-track” structure: AI custom ASICs and networking switch chips deliver strong profitability with fully utilized capacity, while traditional PCIe controllers and networking chips face capacity reductions, further compounded by certain product discontinuations, creating severe supply-demand imbalances in the spot market. The underlying structural issue is the spillover effect of capacity allocation shifting toward AI applications.



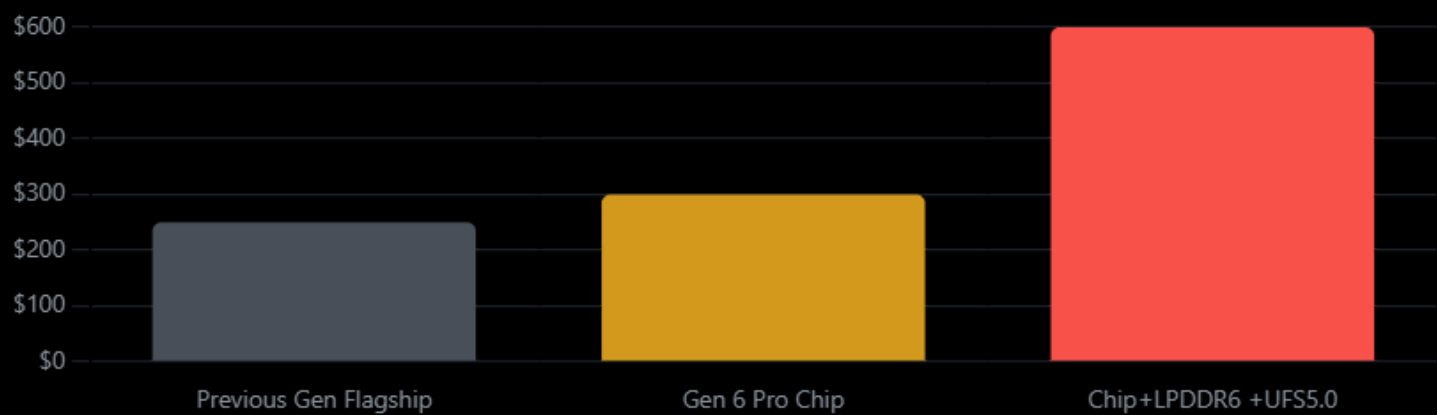
2.1.9 Intel: Q2 Revenue Achieves Fastest Growth in Nearly 15 Years, Data Center Revenue Surges 59%

Intel reported Q2 revenue of USD 16.1 billion (+25%), marking the fastest growth rate since 2011. Data Center and AI (DCAI) revenue reached USD 6.3 billion (+59%), delivering the strongest quarterly growth in the segment's history. CEO Lip-Bu Tan stated that demand continues to exceed supply, with 10 long-term agreements (LTAs) already signed. In the spot market, Xeon 6740P is priced at approximately USD 9,800, while 4th Gen Xeon 4410Y/4410T remain in shortage. The Xeon 6 series has become Intel's fastest-ramping product family in company history. AI infrastructure investment is expanding beyond GPUs toward CPUs, and supply constraints are expected to persist in the near term.



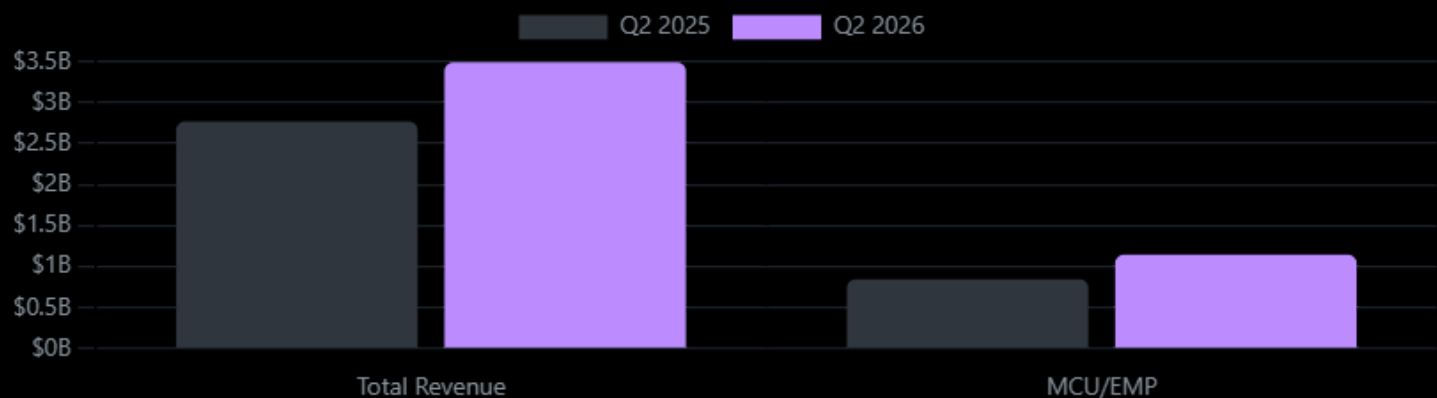
2.1.10 Qualcomm: Double-Digit Price Increase from September, Flagship Chip Costs Exceed USD 300

On July 24, Qualcomm announced a double-digit price increase (>10%) across its product portfolio effective September 1, stating that it could no longer absorb rising supply chain costs. The cost of the Snapdragon 8 Elite Gen 6 Pro is expected to exceed USD 300 per unit (+20%), with the combined cost of the processor, LPDDR6, and UFS 5.0 projected at approximately USD 600. Counterpoint data shows global smartphone shipments declined 11% YoY in Q2, highlighting the tension between rising high-end chip costs and weak end-market demand. From TSMC's 2nm wafers to ASML lithography equipment, cost increases across the semiconductor value chain are ultimately being passed on to smartphone manufacturers and consumers.



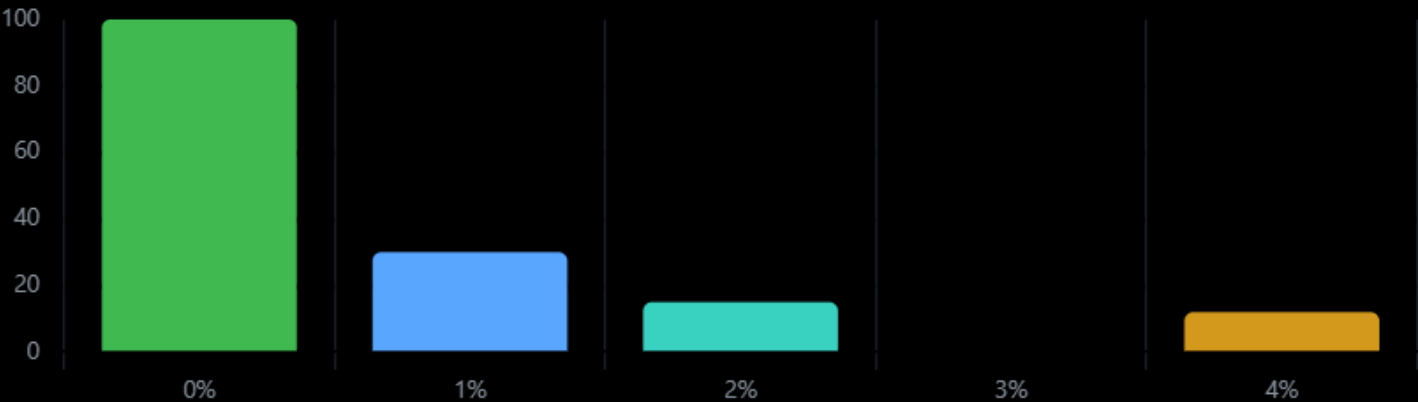
2.1.11 STMicroelectronics: Q2 Beats Estimates; Dual-Engine Driven by General-Purpose MCU and AI Data Center

STMicroelectronics reported Q2 revenue of USD 3.49 billion (+26%), with Embedded Processing Solutions (EMP/MCU) revenue reaching USD 1.147 billion (+35.5%), making it the fastest-growing segment. Lead times for 90nm/180nm wafers extended from 30 weeks to 52 weeks, with book-to-bill approaching 2 and inventory days declining to 126 days. Spot market prices for popular products such as STM32F103 and STM32F405 increased significantly. ST's AI data center strategy is beginning to materialize, with revenue from this segment expected to exceed USD 1 billion in 2026 and surpass USD 2 billion in 2027. The company also announced expanded collaboration with NVIDIA in the physical AI field.



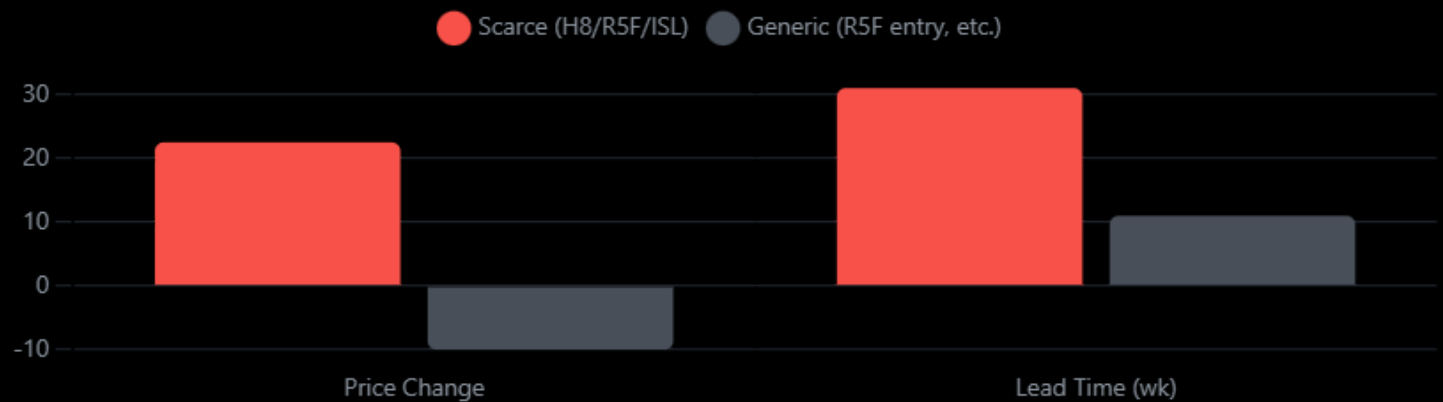
2.1.12 Texas Instruments: Q2 Broadly Outperforms, Supported by Strong Growth Across Three Key Markets

TI reported Q2 revenue of USD 5.463 billion (+23%), net profit of USD 1.98 billion (+53%), and EPS of USD 2.14. By market segment, industrial revenue grew 30%, data center revenue doubled, and automotive revenue achieved double-digit growth. Ample 300mm wafer capacity and cleanroom space provide scalable support for continued expansion. Q3 revenue guidance was USD 5.65–6.15 billion, indicating sustained growth momentum. TI’s growth structure reflects the broader expansion of AI demand beyond GPU computing into power management, analog signal chains, and embedded processing. Capacity allocation will continue to prioritize higher-margin industrial and data center products, while supply recovery for consumer and general-purpose analog chips remains gradual.



2.1.13 Renesas: July Price Increase Takes Effect, Creating Polarization in the Spot Market

Renesas implemented its second price increase of the year on July 1, covering automotive MCUs, industrial power ICs, and driver ICs, with increases ranging from 8% to 15%. The spot market showed clear polarization: automotive MCUs such as H8/300H, high-end automotive R5F products, and ISL power management ICs commanded 15%–30% premiums, with lead times extending to 24–38 weeks amid tight supply. Meanwhile, entry-level R5F general-purpose MCUs, operational amplifiers, and driver ICs saw prices decline, with lead times shortening to 8–14 weeks. The underlying trend reflects capacity shifting toward automotive and high-reliability products, while consumer and general industrial segments remain relatively balanced due to accumulated inventory from earlier periods.



03

Application
Updates

3. Application Updates Overview

Category	Updates	Insight
Artificial Intelligence	Anthropic secured 401MW of AI compute capacity through a 20-year lease with TeraWulf, with operations expected by early 2028.	Long-term AI infrastructure investments are expected to sustain demand for HPC processors, HBM, networking ICs and advanced packaging.
Artificial Intelligence	Nvidia reportedly backs OpenAI's 10GW Ohio AI data centre project, with potential US\$250B financing support and total investment above US\$500B.	AI data centre expansion continues to support demand for GPUs, power management ICs, networking chips and advanced packaging.
Automotive	Ford and GM expanded partnerships with Micron to secure memory and storage supplies for next-generation vehicles.	Strategic supply agreements strengthen long-term demand for automotive DRAM, NAND Flash and storage solutions.
Automotive	Mobileye expands ADAS deployment with Stellantis from 2027, leveraging its REM mapping platform.	ADAS expansion drives higher semiconductor content per vehicle, supporting demand for AI processors, vision SoCs, sensors and automotive memory.
Healthcare	Medical-grade analog component lead times have extended to around six months, driven by supply constraints in precision op amps, isolation amplifiers and ADCs.	Extended lead times are raising sourcing risks for medical-device OEMs reliant on qualified, long-lifecycle analog components.
Healthcare	North America's medical semiconductor market is projected at US\$8.5–9.5B in 2026, amid high import dependency.	Import dependency is driving greater focus on supplier diversification and secure sourcing for medical semiconductor components.

Category	Update	Insight
Industrial	Swiss industrial OEMs are increasing AI chip adoption while continuing to rely on imported semiconductors.	Industrial AI adoption is shifting semiconductor demand from general-purpose processors toward AI-specific computing platforms.
Industrial	ADI and TI shift analog capacity toward AI products as mature-node legacy logic demand declines.	Mature-node capacity changes are raising supply risks for industrial analog and legacy logic components.
Robotics	Unitree expanded H1 Pro humanoid robot sales into Europe, backed by 5,500 units shipped and 32.4% global market share in 2025.	Humanoid robot production growth is driving long-term demand for AI processors, HPC modules and advanced sensing components.
Robotics	Foundation switches Phantom humanoid robots to AMD Ryzen AI Embedded X100 processors from NVIDIA-based platforms.	Alternative AI platforms are increasing competition and diversifying options across the robotics semiconductor ecosystem.
Robotics	AgiBot increases adoption of domestic semiconductors, with MCUs and communication components accounting for one-third of hardware costs.	China's humanoid robotics expansion is driving greater adoption of local semiconductors in procurement strategies.

3.1 Artificial Intelligence

3.1.1 Anthropic, OpenAI & AMD Lock In Long-Term AI Compute

Anthropic has signed a 20-year, US\$19 billion lease with TeraWulf for a 401MW dedicated AI data center in Kentucky (full operations by 2028). Separately, OpenAI has raised its projected 2030 computed budget to US\$750 billion — a 25% increase from prior estimates. AMD also announced a US\$5 billion investment in Anthropic, deploying up to 2GW of AMD Instinct MI450 Series GPUs. Together, these three commitments signal a clear shift: hyperscalers are now securing dedicated compute capacity years in advance, locking in future supply rather than chasing spot availability. The procurement impact is tangible — as AI giants anchor long-term demand through GPU partnerships and dedicated infrastructure, HPC accelerators, HBM, high-speed networking ICs and advanced packaging will face sustained tightening. Distributors serving AI applications should factor sustained demand elevation into near-term planning.

3.1.2 Nvidia Supports Proposed 10GW Ohio AI Data Centre Project

Nvidia is reportedly discussing an approximately US\$250 billion financing guarantee to support OpenAI's potential lease of capacity at a proposed 10GW AI data centre campus being developed by SB Energy in Ohio. Total project investment is estimated to exceed US\$500 billion, although financing and commercial agreements remain under discussion. The proposed development highlights the scale of future AI infrastructure investment and supporting compute capacity requirements. Projects of this scale require substantial volumes of AI GPUs, networking chips, power management ICs and advanced semiconductor packaging. Semiconductor buyers supporting AI infrastructure should prepare for continued competition in sourcing high-performance components.

3.2 Automotive

3.2.1 Ford & GM Lock in Micron Long-Term Deals

Ford and General Motors have strengthened long-term partnerships with Micron to secure automotive memory and storage components for future vehicle platforms. The agreements include close collaboration on platform specifications, while Micron continues expanding its US\$2 billion Virginia facility to support automotive-grade 1-alpha DRAM production. These initiatives reflect the growing importance of long-term supply planning as vehicle electronics become increasingly software-defined. Automotive OEMs are moving beyond spot purchasing towards long-term semiconductor procurement, supporting stable demand for automotive DRAM, NAND Flash and embedded storage while encouraging earlier sourcing commitments across the supply chain.

3.2.2 Mobileye ADAS for Stellantis, REM Covers 95%+ US & EU Roads

Mobileye and Stellantis have partnered to deploy Cloud-Enhanced ADAS across selected vehicle models from 2027. Mobileye's REM platform covers more than 95% of public roads in the U.S. and Europe, combining data collected from over 8 million vehicles and 34 billion miles of driving to enable intelligent lane keeping, including roads without lane markings. The collaboration expands the use of cloud-enhanced driving technologies in mass-market vehicles. Higher ADAS adoption raises semiconductor content per vehicle, supporting procurement of AI processors, vision SoCs, automotive memory, image sensors and connectivity ICs required for next-generation driver assistance systems.

3.3 Healthcare

3.3.1 ADI Warns of Medical Analog Chip Supply Risks

Industry channel reports indicate that lead times for selected medical-grade analog components have extended to approximately six months, affecting precision operational amplifiers, isolation amplifiers and analog-to-digital converters. These components are commonly used in patient-monitoring, diagnostic and therapeutic equipment, where approved parts cannot be replaced quickly because of regulatory and qualification requirements. Customers without scheduled orders may therefore face less predictable delivery availability, while urgent spot-market procurement carries additional traceability and counterfeit risks. Medical device manufacturers may need to place orders earlier and maintain closer visibility over qualified analog inventories. Tight availability particularly affects precision amplifiers, isolation ICs, ADCs and other medical-grade components whose replacement or requalification can disrupt production schedules.

3.3.2 North American Medical Semiconductor Market Faces Import Concentration

Commercial market estimates value North America's medical semiconductor market at approximately US\$8.5–9.5 billion in 2026. Regional medical-device production depends heavily on imported semiconductors used across diagnostic imaging, patient monitoring, wearable devices and therapeutic systems. This exposure leaves manufacturers sensitive to overseas manufacturing constraints, logistics disruption and geopolitical developments, particularly for components requiring medical-grade qualification and long product support. Import dependence strengthens the case for diversified sourcing across medical-grade analog ICs, sensors, MCUs and connectivity components. OEMs may also place greater emphasis on traceable supply channels and lifecycle assurance when qualifying alternative suppliers.

3.4 Industrial

3.4.1 Swiss Industrial OEMs Shift Towards AI Accelerator Chips

Swiss industrial manufacturers, including ABB, Rieter and Bobst, continue to depend on imported semiconductors while increasing the deployment of AI accelerator chips in industrial automation equipment. As AI-enabled inspection, robotics and machine control applications expand, industrial systems are moving beyond traditional processors towards dedicated AI computing platforms capable of handling more complex workloads. Industrial AI deployment is increasing procurement of AI accelerators, industrial processors, memory and high-speed connectivity ICs, while encouraging OEMs to diversify semiconductor sourcing for critical computing components.

3.4.2 ADI & TI Shift Industrial Analog Capacity Towards AI; Legacy Logic Enters EOL

ADI and Texas Instruments are reallocating industrial precision analog wafer capacity towards AI-focused products, while selected Legacy Logic (74xx series) devices are entering end-of-life as manufacturers continue reducing investment in low-margin mature-node production. These changes have extended qualification timelines for replacement components, with alternative validation often requiring 6–12 months for industrial applications. Reduced mature-node capacity is tightening availability of industrial analog ICs, legacy logic devices and control components, making early qualification and multi-source procurement increasingly important for maintaining production continuity.

3.5 Robotics

3.5.1 Unitree Launches H1 Pro Across Europe Following Shanghai IPO Approval

Unitree officially launched the H1 Pro humanoid robot across Europe on 22 July following approval for its proposed Shanghai IPO. The company shipped approximately 5,500 humanoid robots globally in 2025, capturing an estimated 32.4% market share. The H1 Pro is built on NVIDIA computing platforms, while proceeds from the planned IPO are expected to support future production expansion, R&D and supply-chain investment. As humanoid robots move from prototype development towards commercial deployment, procurement is shifting from engineering samples to production-scale purchasing. This transition supports higher demand for AI processors, high-bandwidth memory, image sensors, motion-control ICs and power-management devices across the robotics supply chain.

3.5.2 Foundation Selects AMD Ryzen AI Embedded X100 for Phantom Humanoid Robot

At AMD Advancing AI, Foundation announced that its Phantom humanoid robot will adopt AMD Ryzen AI Embedded X100 processors. The decision replaces the company's previous NVIDIA-based architecture and reflects AMD's strategy of combining CPUs, GPUs, NPUs and FPGA technologies into an open robotics computing platform. Greater adoption of alternative AI computing platforms could reduce reliance on a single chip supplier while creating additional sourcing opportunities across embedded processors, AI accelerators, memory and supporting connectivity devices. A more diversified ecosystem also provides OEMs with greater flexibility when selecting long-term robotics hardware platforms.

3.5.3 AgiBot Expands Domestic Semiconductor Adoption

AgiBot confirmed that domestic semiconductors, including MCUs and communication components, now represent approximately one-third of its hardware procurement costs. The company is progressively replacing imported components as it expands humanoid robot production, reflecting a broader localisation trend across China's robotics industry. Rising localisation is creating sustained demand for domestic MCUs, power semiconductors, communication ICs and sensor devices. As Chinese robotics manufacturers qualify more local components, procurement strategies are expected to become increasingly diversified, reshaping competitive dynamics for both domestic and international semiconductor suppliers.

04

Memory Market Trends

4. Memory Market Trends

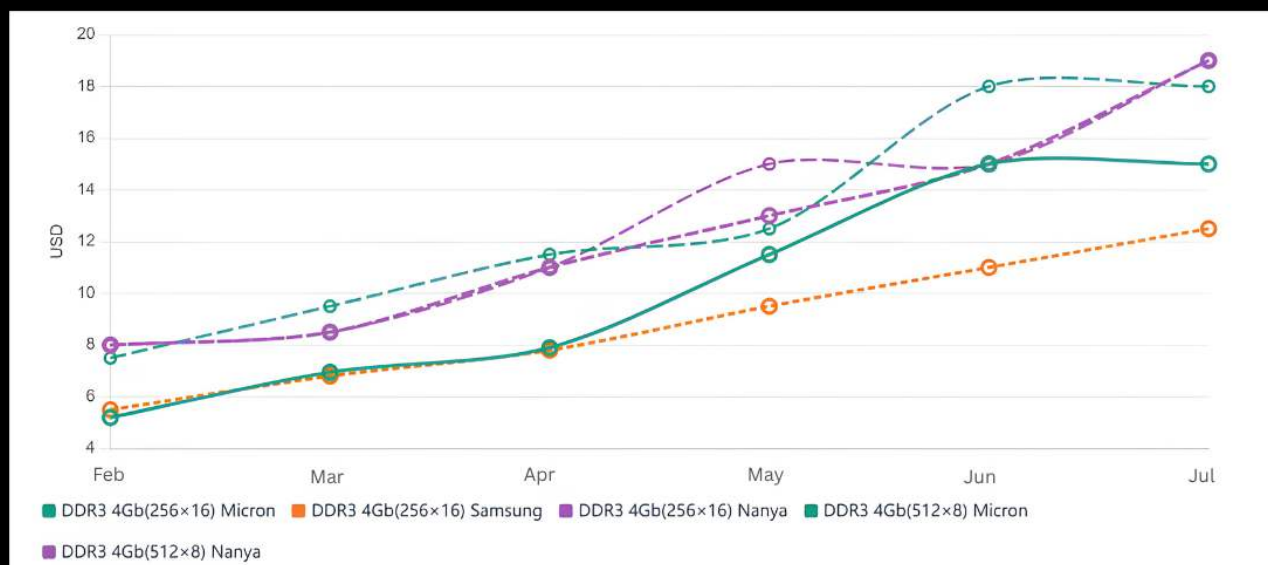
4.1 Memory Market Overview

- **DRAM:** Q3 contract prices expected to rise 13–18% due to widening supply-demand gap.
- **DDR4:** Supply tightening pushes prices higher, though some spot prices are easing.
- **DDR5:** Rising chip costs and cloud demand keep prices elevated.
- **NAND Flash:** Q3 contract prices expected to increase 10–15%, limited by slower consumer demand.

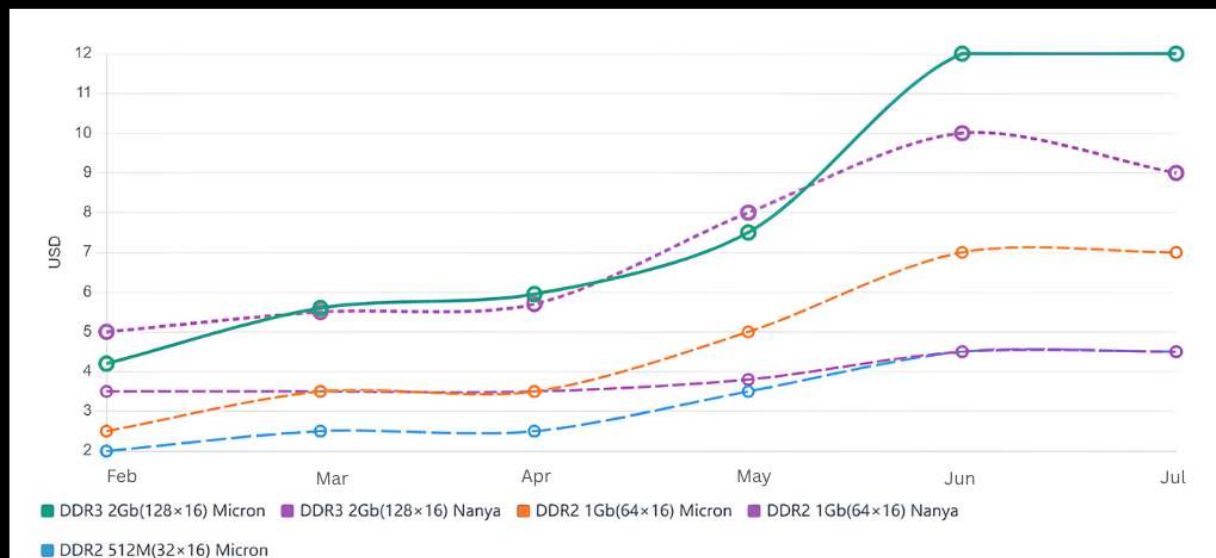
4.2 Memory Category / Brand Spot Market Price Trends

DDR3 / DDR2 DRAM Chips — Legacy models saw price increases of 100%–188%.

- Micron 4Gb prices surged +188%: from \$5.2 to \$15; Nanya followed with increases of +127%–154%. DDR3 2Gb Micron rose from \$4.2 to \$12 (+186%), while DDR2 1Gb Micron increased from \$2.5 to \$7 (+180%). Supply shortages have now extended to the oldest process nodes.



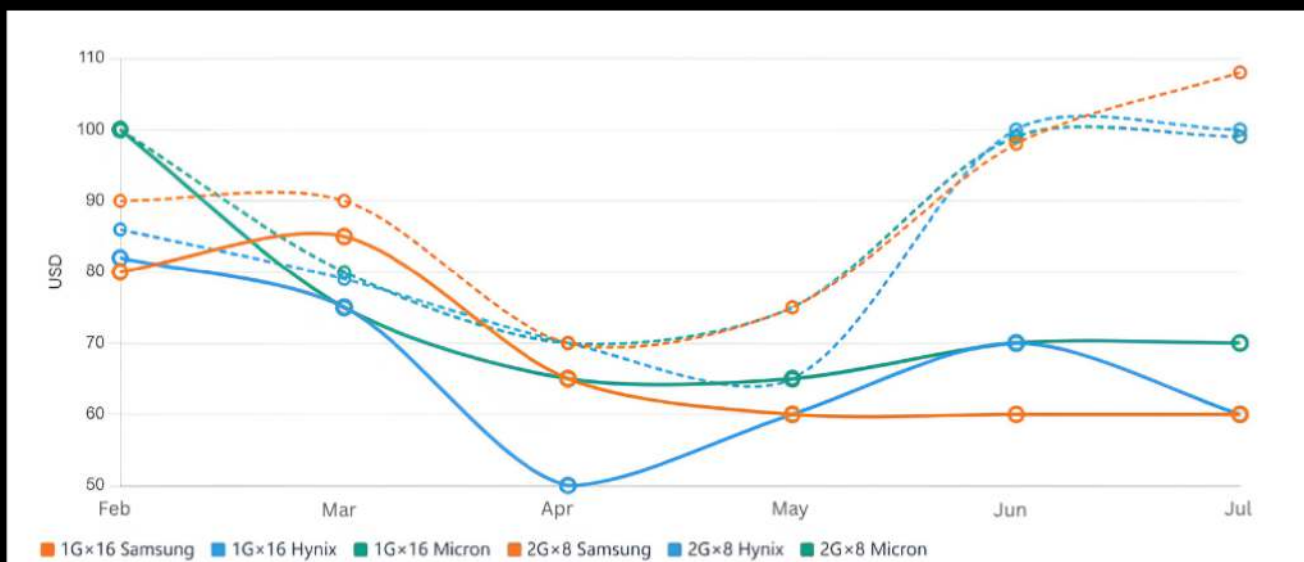
DDR3 4Gb Chips (256x16 / 512x8) Price Trends by Brand (Feb–Jul)



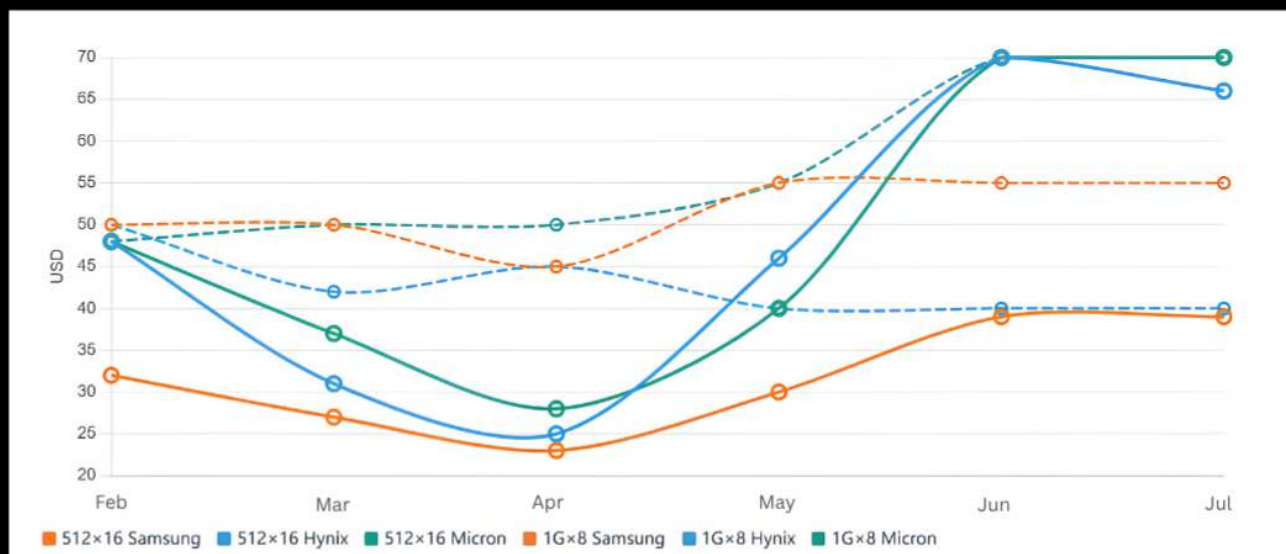
DDR3 2Gb / DDR2 1Gb / DDR2 512M Chip Price Trends (Feb–Jul)

DDR4 Chips — Large-capacity prices declined while small-capacity prices increased, showing a V-shaped trend.

- 16Gb prices declined from high levels: \$80–\$100 in Feb–Mar, followed by a sharp drop in April, then rebounded to \$100+ for 2G×8 in Jun–Jul, showing a V-shaped trend driven by supply-demand dynamics. 8Gb prices increased: Samsung +22%, Hynix +38%, and Micron +46% for 512×16, with a significant surge in June as Q3 price increases take effect.



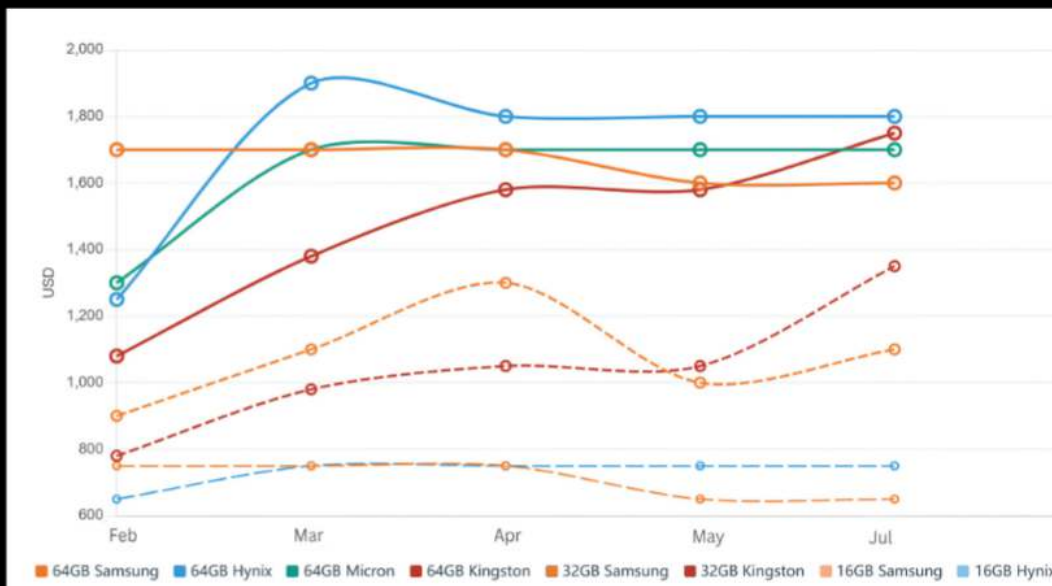
DDR4 16Gb Chips (1G×16 / 2G×8) Price Trends by Brand (Feb–Jul)



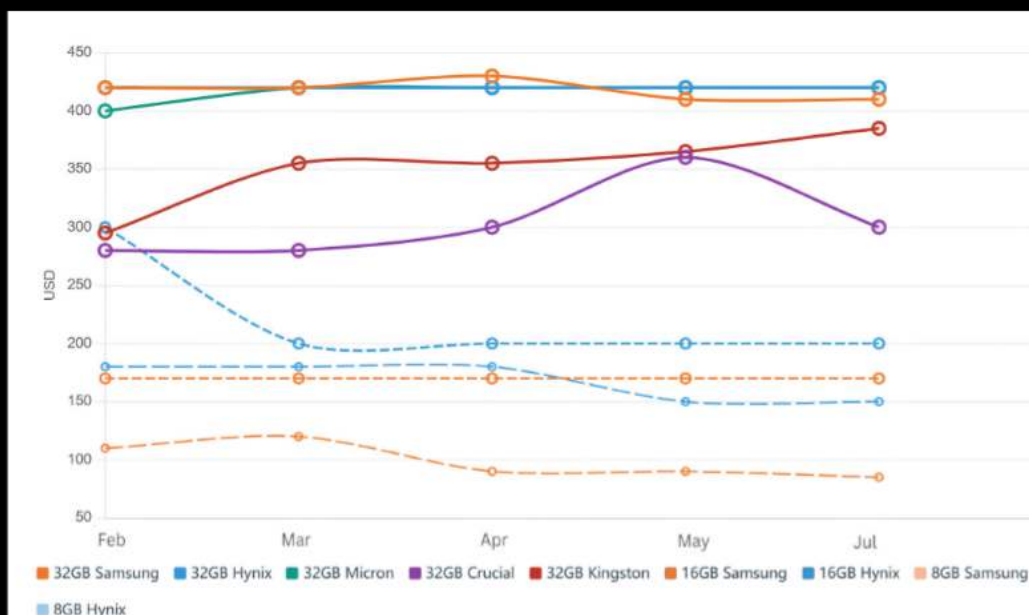
DDR4 8Gb Chips (512×16 / 1G×8) Price Trends by Brand (Feb–Jul)

DDR4 Memory Modules — Higher-capacity server memory modules command higher prices, while consumer memory prices remain relatively stable.

- Server memory modules: Kingston saw a significant price rebound of +62% to +73%, with second-tier brands catching up from lower price levels — 64GB +62%, 32GB +73%. Samsung 64GB declined -6% against the trend, highlighting clear brand differentiation. Consumer memory prices remained relatively stable.



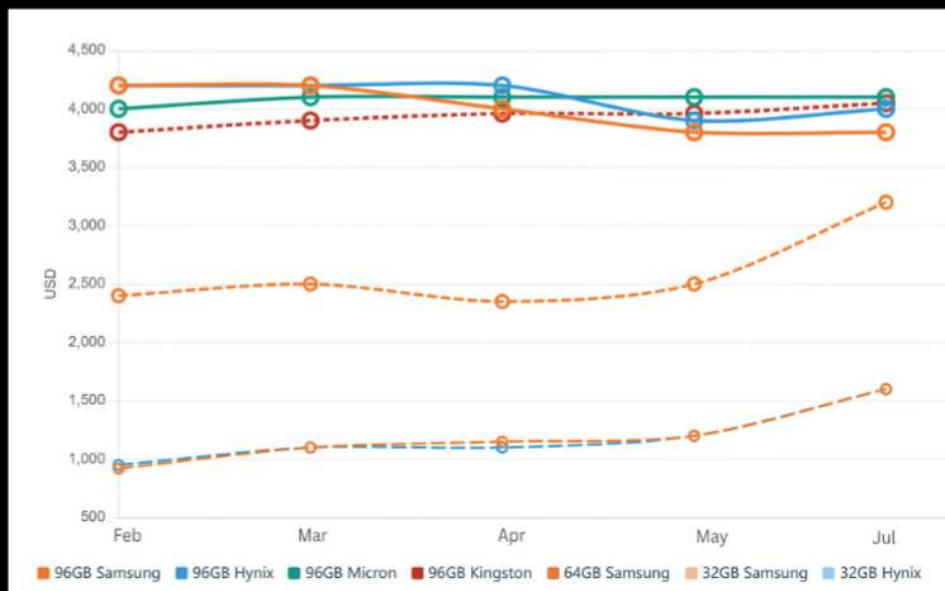
DDR4 Server Memory Modules (64GB / 32GB / 16GB) Price Trends by Brand (Feb-Jul)



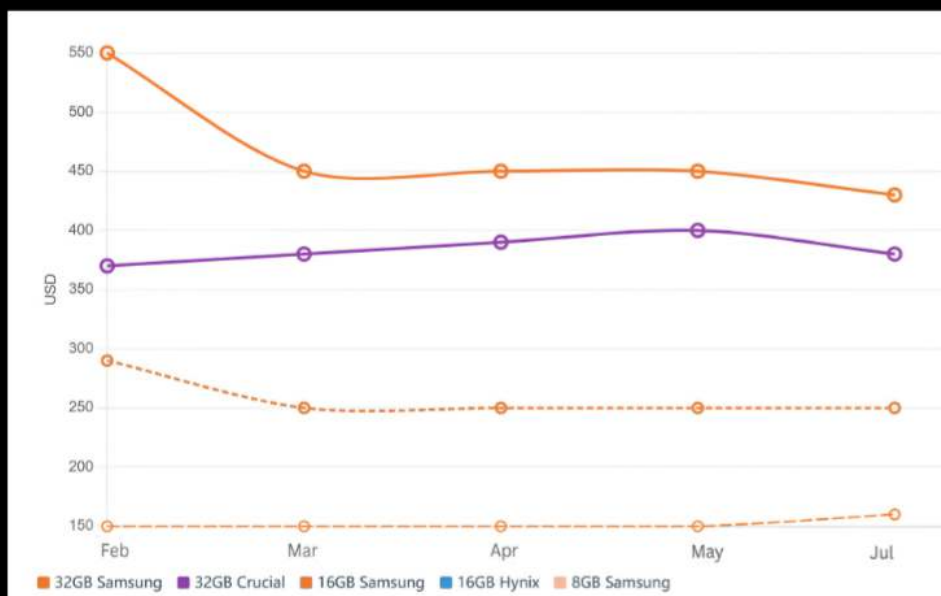
DDR4 PC Memory Modules (32GB / 16GB / 8GB) Price Trends by Brand (Feb-Jul)

DDR5 Memory Modules — AI demand drives strong pricing, with high-capacity modules fluctuating at elevated levels.

- 32GB prices surged +33% in June: Samsung increased from \$1,200 to \$1,600, driven by AI server inference demand. 96GB prices recovered to above \$4,000 in June after softening in April–May. Meanwhile, PC DDR5 prices continued to decline: Samsung 32GB fell from \$550 to \$430 (-22%), and 16GB from \$290 to \$250 (-14%), as sufficient consumer DDR5 capacity keeps pricing competitive.



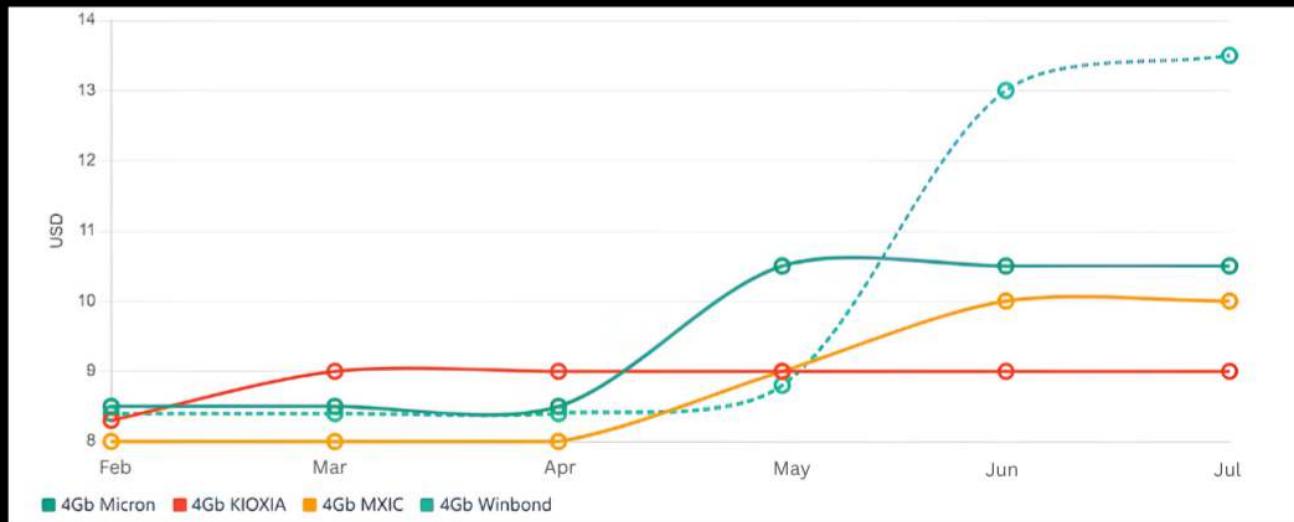
DDR5 Server Memory Modules (96GB / 64GB / 32GB) Price Trends by Brand (Feb-Jul)



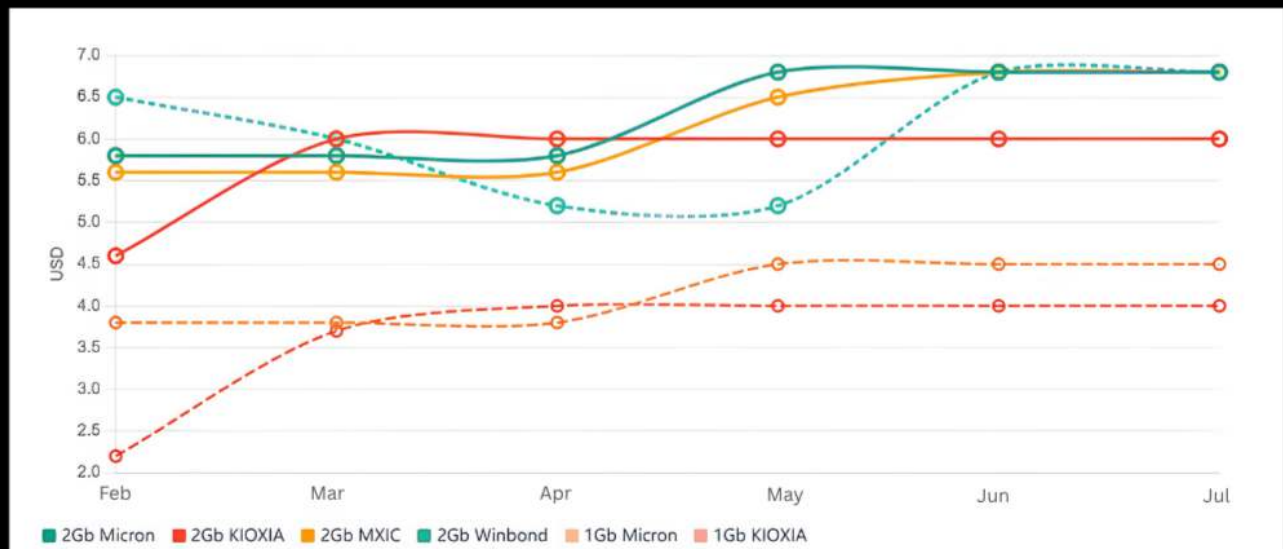
DDR5 PC Memory Modules (32GB / 16GB / 8GB) Price Trends by Brand (Feb-Jul)

NAND Flash SLC Chips — Driven by strong supplier pricing power, substitution demand, and supply shortage effects.

- Winbond 4Gb increased +61%: from \$8.4 to \$13.5, driven by NOR Flash/NAND substitution demand. Micron/KIOXIA/MXIC prices rose by 8–25%. KIOXIA 1Gb surged +82%: from \$2.2 to \$4, reflecting strong supplier pricing power. Micron 2Gb and 1Gb increased steadily by +17% and +18%, respectively.



NAND 4Gb SLC Chips Price Trends by Brand (Feb-Jul)



NAND 2Gb/1Gb SLC Chips Price Trends by Brand (Feb-Jul)

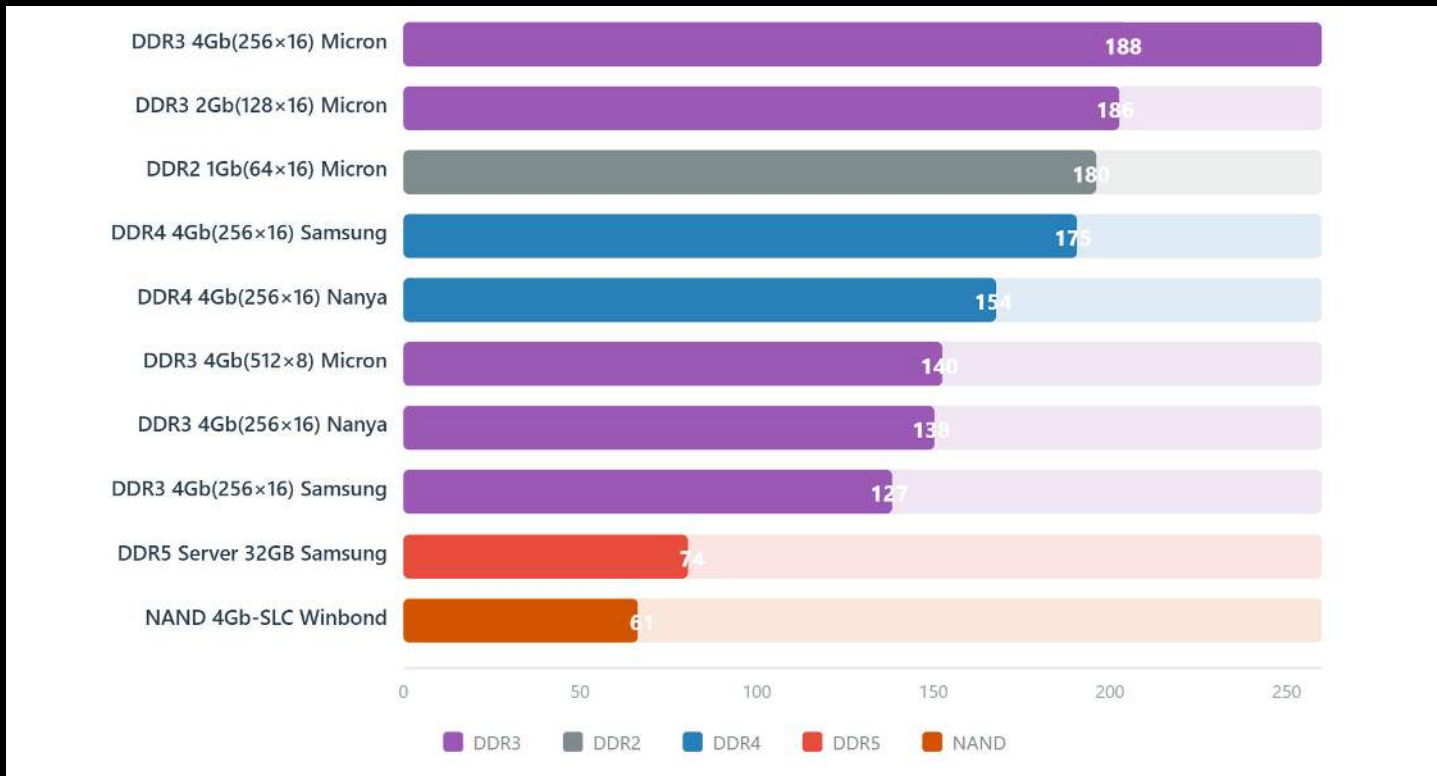
Cross-Generation Technology Comparison — Price Increase Heatmap

- Cumulative Price Increase Heatmap — Technology Generation × Product Specification × Brand (Darker Red Indicates Higher Price Increase)

Memory Technology	Product Specification	Brand	Feb Price (\$)	Jul Price (\$)	Cumulative Change (%)
DDR3	4Gb 256×16	Micron	\$5.2	\$15	+188%
DDR3	4Gb 256×16	Samsung	\$5.5	\$12.5	+127%
DDR3	4Gb 256×16	Nanya	\$8	\$19	+138%
DDR3	4Gb 512×8	Micron	\$7.5	\$18	+140%
DDR3	2Gb 128×16	Micron	\$4.2	\$12	+186%
DDR3	2Gb 128×16	Nanya	\$5	\$9	+80%
DDR2	1Gb 64×16	Micron	\$2.5	\$7	+180%
DDR2	512M 32×16	Micron	\$2	\$4.5	+125%
DDR4	16Gb 1G×16	Samsung	\$60	\$60	-25%
DDR4	16Gb 2G×8	Samsung	\$90	\$108	+20%
DDR4	8Gb 512×16	Hynix	\$48	\$66	+38%
DDR4	8Gb 512×16	Micron	\$48	\$70	+46%
DDR4	8Gb 1G×8	Micron	\$48	\$70	+46%
DDR4	4Gb 256×16	Samsung	\$8	\$22	+175%
DDR4	4Gb 256×16	Nanya	\$13	\$33	+154%
DDR5	Server 96GB	Samsung	\$4200	\$3800	-10%
DDR5	Server 64GB	Samsung	\$2400	\$3200	+33%
DDR5	Server 32GB	Samsung	\$920	\$1600	+74%
DDR5	Server 32GB	Hynix	\$950	\$1600	+68%
NAND	4Gb SLC	Winbond	\$8.4	\$13.5	+61%
NAND	4Gb SLC	Micron	\$8.5	\$10.5	+24%
NAND	1Gb SLC	KIOXIA	\$2.2	\$4	+82%

Top 10 Price Increase Ranking (Cumulative Growth from Feb-Jul)

- Color-Coded by Technology Generation: DDR3 / DDR4 / NAND / DDR5



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July 2026

Brioccean

YOUR AI-POWERED PARTNER FOR GLOBAL SOURCING

Established in 2008 and headquartered in Singapore, Brioccean 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 m² 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.