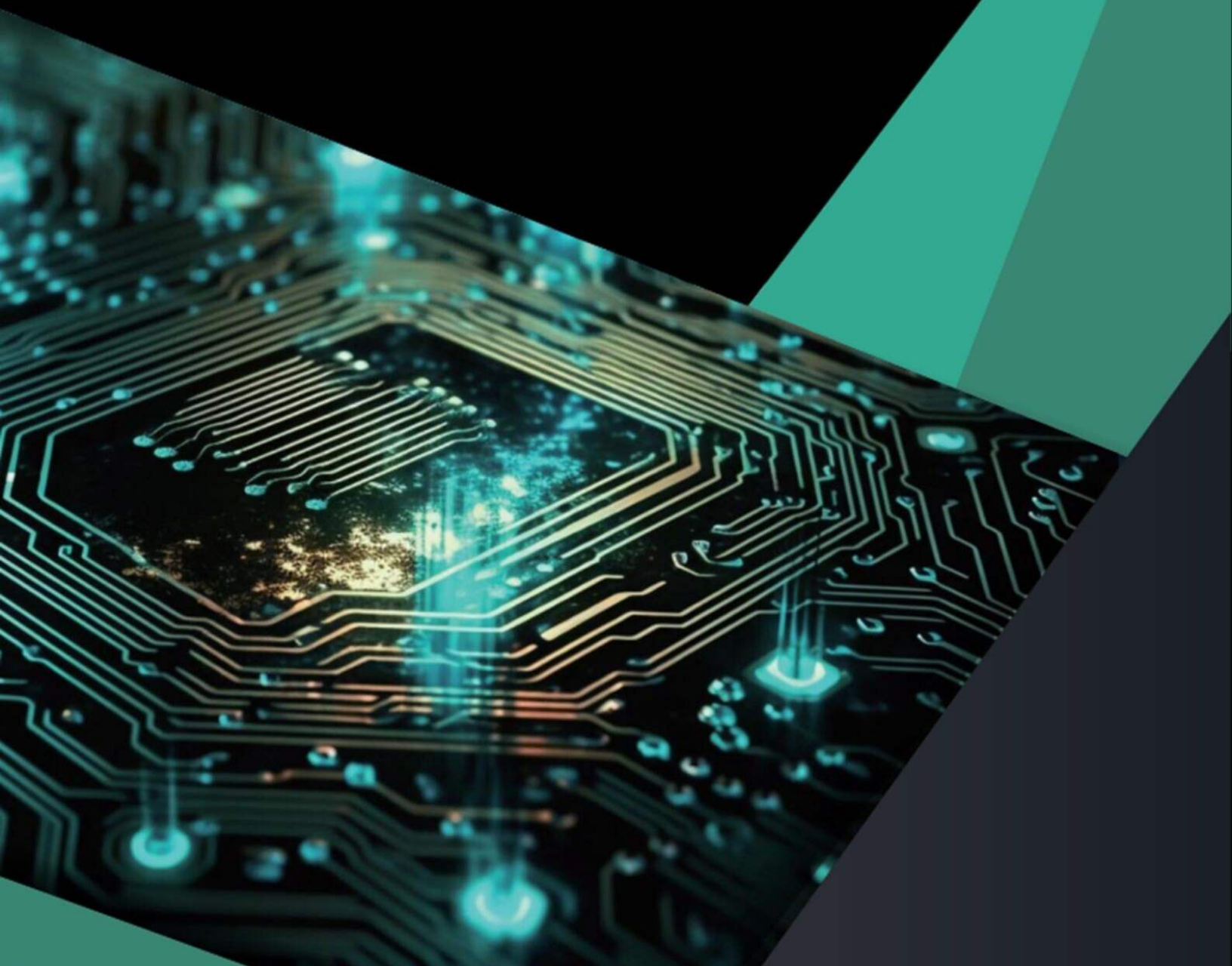
BRIOCEAN

October 2026

Monthly Market Research

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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, AS9120B, ISO14001, ANSI/ESD S20.20-2021, and ISO9001 – with AS6081 and AS9120B 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	- U.S.: Treasury Proposes COINS Act Rules, Extending Semiconductor Controls From Exports to Capital Flows - U.S./Japan: First Semiconductor Project Agreed Under Strategic Investment Initiative, With Two New GlobalFoundries Mature-Node Fabs in New York - China: Proposed Technology Export Catalogue Revision Covers 40 AI, Biopharmaceutical and Photovoltaic Technologies - EU: Chips Act 2.0 Enters Intensive Review as Europe Strengthens Semiconductor Supply Chain Resilience
Semiconductor Industry Update	- SK Hynix: Q3 Revenue Tops KRW 100 Trillion (USD 74.78 Billion) for the First Time, With an 80% Operating Margin - Texas Instruments: Q3 Revenue Reaches USD 6.055 Billion, With Q4 Guidance of USD 5.8–6.3 Billion - TSMC: Q3 Revenue Reaches USD 46.72 Billion, With 2nm Accounting for 8% of Wafer Revenue - Samsung Electronics: Q3 Earnings Guidance Puts Operating Profit at Approximately KRW 107.4 Trillion (USD 80.31 Billion) - Nanya Technology: Q3 Revenue Reaches TWD 133.649 Billion (USD 4.11 Billion), With an 85.7% Gross Margin - Micron: Second Advanced Assembly and Test Facility Opens in Taichung, With 2027 HBM Capacity Fully Booked - PSMC: September Revenue Hits a Record TWD 7.665 Billion (USD 235.90 Million), Following Two Wafer Price Increases This Year - UMC: September Net Sales Reach a Monthly Record of TWD 25.350 Billion (USD 780.18 Million) - NVIDIA: DSX POD Unveiled at GTC Berlin, Cutting Deployment Time to as Little as 14 Days - Microchip Technology: VORAGO Acquisition Completed, Expanding Aerospace and Defense Chip Portfolio

Category	Trend
End-market (Artificial Intelligence)	- Meta's Q3 Revenue Up 26%; 2026 Capex Guidance Raised to US$135–145 Billion - AWS's 2027 Cloud Capacity Largely Sold Out; 2026 Capex at About US$220 Billion - Google to Fund About US$600 Million in Data Center Grid and Energy Storage Expansion
End-market (Automotive)	- BYD Considers French Plant; Hungary Factory to Begin Mass Production in Q4
End-market (Robotics)	- Tesla Optimus Enters Early Production at Fremont
End-market (Industrial)	- Siemens and NVIDIA Advance AI-Powered Autonomous Manufacturing
Memory Market Trends	- DRAM Contract: Major suppliers' mature-node phaseouts tighten DDR4 supply, supporting moderate consumer DRAM price increases this quarter. - DRAM Spot: DDR4/DDR5 trading remains thin; weak demand and typhoon disruptions limit selective price gains. - NOR Flash: High-density prices rise 90%–110% in H2; low-density gains ease to 10%–20% in Q4, with prices stabilizing at elevated levels. - HDD: Strong high-capacity nearline demand and supply shortages push prices higher.

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01

Macro Environment Updates

1. Macro Environment

1.1 Industry Policy

1.1.1 U.S.: Treasury Proposes COINS Act Rules, Extending Semiconductor Controls From Exports to Capital Flows

On October 22, the U.S. Department of the Treasury's Office of Investment Security issued a notice of proposed rulemaking seeking public comment on implementing the COINS Act, proposing a new 31 CFR Part 851 to succeed the existing Outbound Investment Security Program regulations. The proposal introduces three substantive changes: the artificial intelligence category is renamed "super intelligence systems" and becomes prohibited, subject to limited exceptions such as internal, non-commercial use, with the notification-only category removed; semiconductor prohibitions expand to radiation-hardened chips, photonic integrated circuits and high-bandwidth memory; and biotechnology is added for the first time as a prohibited category. Countries of concern expand to include China, including Hong Kong and Macao, Russia, North Korea, Iran, Cuba and Venezuela. Comments are due by December 7, 2026, and final rules must be completed by March 13, 2027, with the effective date to be determined separately. The proposal contains no general grandfathering provision.

1.1.2 U.S./Japan: First Semiconductor Project Agreed Under Strategic Investment Initiative, With Two New GlobalFoundries Mature-Node Fabs in New York

On October 15, Japan's Ministry of Foreign Affairs, Ministry of Finance, and Ministry of Economy, Trade and Industry jointly announced that Japan and the U.S. had agreed on October 14, U.S. time, to implement a semiconductor manufacturing project under the Strategic Investment Initiative. GlobalFoundries will build and operate two fabs at its existing campus in Malta, New York, fully funded by Japan and jointly owned by the U.S. government and Japanese interests. Initial investment is approximately USD 10 billion, equivalent to around JPY 1.6 trillion, with a further USD 10 billion planned for the second fab and total funding of up to approximately USD 21 billion. Construction is scheduled to begin before the end of 2026, with the first fab expected to start production in 2029. The project aims to expand mature-node capacity for automotive,

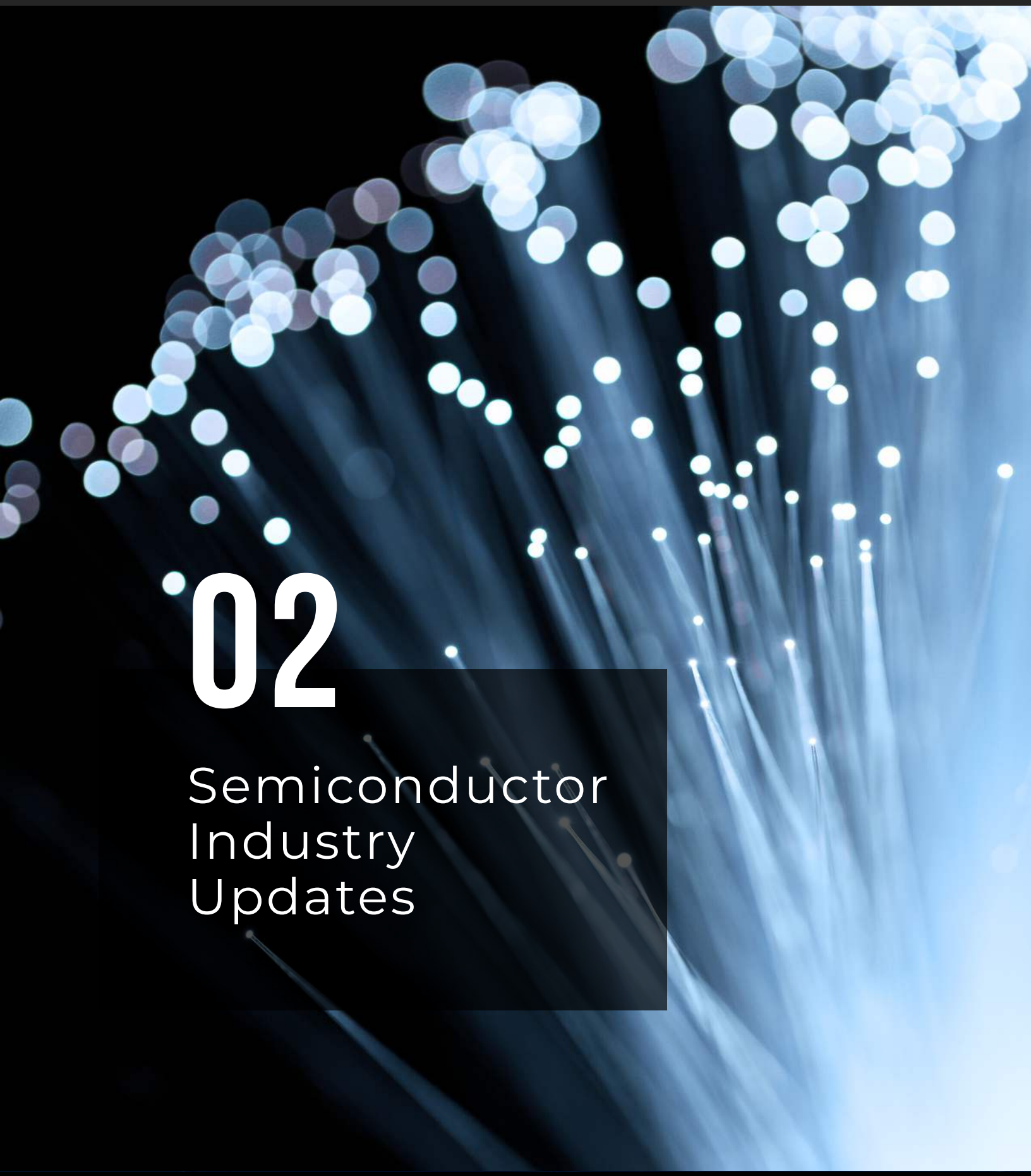
industrial machinery, smartphone and AI data center applications. Tokyo Electron and SCREEN Holdings have expressed interest in supplying manufacturing equipment, TOKYO OHKA KOGYO in supplying materials and components, and Renesas Electronics in purchasing products. Fujikin and Kusakawa Seiki have also expressed interest in supplying equipment, materials and components.

1.1.3 China: Proposed Technology Export Catalogue Revision Covers 40 AI, Biopharmaceutical and Photovoltaic Technologies

On October 16, 2026, China's Ministry of Commerce and Ministry of Science and Technology issued Announcement No. 48 of 2026, seeking public comment on revisions to the Catalogue of Technologies Prohibited and Restricted from Export by China and introducing temporary pre-export registration requirements for the technologies concerned. The proposal would add 40 technologies across AI, biopharmaceuticals and photovoltaics, with 14 prohibited and 26 restricted. AI accounts for 23 entries covering large AI models, AI agents and computing clusters; prohibited technologies include AI-driven malware generation and mutation, while restricted technologies include AI-assisted vulnerability discovery. Five biopharmaceutical entries cover pathogenic microorganisms, cell and gene therapies, and oligonucleotide drugs. Twelve photovoltaic entries span polysilicon, wafer, and solar cell manufacturing, prohibit perovskite and tandem solar cell and module production technologies, and restrict polysilicon engineering technologies with an annual capacity of at least 30,000 metric tons per production line. For AI technologies, open-source releases, overseas self-built and self-operated computing centers, overseas chip tape-outs and joint R&D would qualify for automatic licensing, effectively allowing exports upon filing; technologies already in the public domain would be excluded. Overseas local deployment of restricted AI technologies would fall within scope, although deployment on an exporter's own overseas cloud infrastructure could qualify for automatic licensing. API access, web-based interaction, SaaS and lightweight on-device deployment would be excluded. Authorities described the measures as routine administration, targeting no specific country, with the scope subject to ongoing adjustment.

1.1.4 EU: Chips Act 2.0 Enters Intensive Review as Europe Strengthens Semiconductor Supply Chain Resilience

In October 2026, the EU's Chips Act 2.0 entered an intensive review phase. Within the Council, the Irish Presidency submitted a revised compromise text to the Working Party on Competitiveness and Growth (Industry), with review by member-state experts beginning on October 29. The text makes corporate disclosures to the B2B semiconductor supply chain platform voluntary and further limits the European Commission's power to request information directly from companies, giving national competent authorities the initial role. During a crisis, the Commission could still request capacity and supply disruption information from companies across the value chain, but only if voluntary mechanisms or aggregated data proved insufficient. Reporting requirements were also clarified, reflecting divisions among member states over stronger oversight versus lower administrative burdens. Meanwhile, the relevant commission of the European Committee of the Regions adopted its opinion on October 6, with a plenary vote scheduled for December. The European Economic and Social Committee adopted its opinion at its October 21 plenary, emphasizing industrial competitiveness, technological sovereignty and SME access to funding, pilot lines and design tools. Industry groups also weighed in: Technology Industries of Finland issued seven recommendations on October 19, calling for a demand-led approach and dedicated funding of EUR 30–60 billion (approximately USD 33.4–66.8 billion), while ZVEI, the German Electro and Digital Industry Association, published proposed amendments on October 16 calling for proportionate monitoring and reporting obligations. The proposal shifts from the original Act's supply-led approach toward addressing both supply and demand, introducing Demand Accelerators, strengthening supply chain monitoring and crisis response, and setting a maximum permitting period of 12 months. Based on publicly available information, the European Parliament's Committee on Industry, Research and Energy (ITRE) has yet to publish a draft report, and negotiating positions remain under development. Whether faster permitting can be balanced with the creation of real demand ultimately depends on the final EU budget arrangements for 2028–2034.



02

Semiconductor Industry Updates

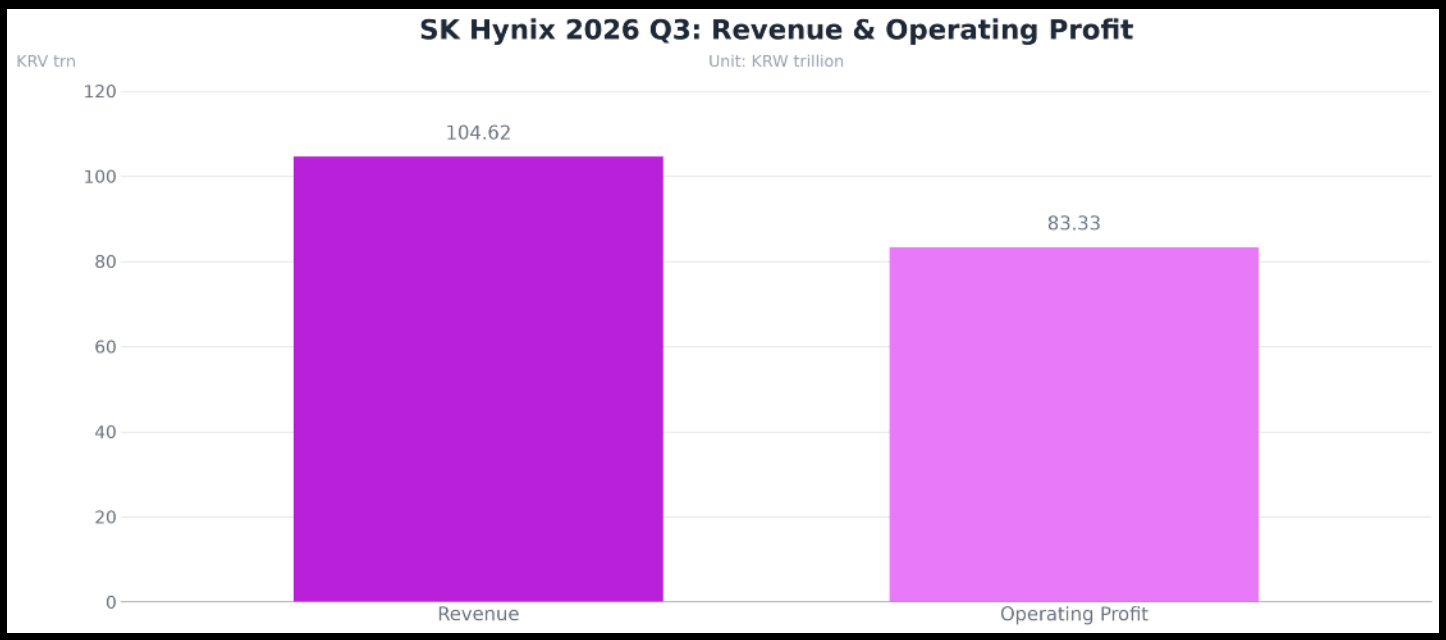
Semiconductor Industry Overview

Manufacturer	Category	Key Metrics	Trend
SK Hynix	Memory	Q3 revenue: KRW 104.62 trillion (USD 78.23 billion), +328% YoY; operating profit: KRW 83.33 trillion (USD 62.31 billion), with an 80% operating margin	Revenue milestone; HBM4 volume ramp-up
Texas Instruments (TI)	Analog / PMICs / Signal Chain	Q3 revenue: USD 6.055 billion; Q4 guidance: USD 5.8–6.3 billion	Shipment-led growth; lower inventory days
TSMC	Foundry / Advanced Packaging	Q3 revenue: USD 46.72 billion, +41.2% YoY and +16.2% QoQ	Advanced technologies drive growth
Samsung Electronics	Memory / Foundry	Q3 revenue: approximately KRW 195 trillion (USD 145.82 billion), +127% YoY; operating profit: approximately KRW 107.4 trillion (USD 80.31 billion), +782.5% YoY	Record quarterly profit
Nanya Technology	Memory	Q3 revenue: TWD 133.649 billion (USD 4.11 billion), +61.9% QoQ	Higher prices offset lower volumes; record profit
Micron	Memory	Most overall 2027 HBM capacity reserved by customers; Singapore HBM advanced packaging facility expected to contribute capacity from 2027	Packaging and test capacity expands; capacity largely booked
PSMC	Memory / Logic	September revenue: TWD 7.665 billion (USD 235.90 million); Q3 revenue: approximately TWD 21.342 billion (USD 654.3 million)	Higher volumes and prices
UMC	Logic / Specialty Technologies	September revenue: TWD 25.350 billion (USD 780.18 million); first-nine-month revenue: TWD 204 billion (USD 6.28 billion)	Seven consecutive months of revenue growth
NVIDIA	GPUs / AI Accelerators	DSX POD deployment time reduced from six months to as little as 14 days	Shorter deployment cycle
Microchip	MCUs / Analog / PMICs	Acquisition of VORAGO Technologies	Radiation-hardened MCUs added; aerospace and defense portfolio strengthened

2.1 Manufacturer Dynamics In-Depth Analysis

2.1.1 SK Hynix: Q3 Revenue Tops KRW 100 Trillion (USD 74.78 Billion) for the First Time, With an 80% Operating Margin

On October 28, SK Hynix reported its third-quarter 2026 results. Revenue reached KRW 104.62 trillion (USD 78.23 billion), up 328% YoY and 32% QoQ, exceeding KRW 100 trillion for the first time. Operating profit reached KRW 83.33 trillion (USD 62.31 billion), up 632% YoY and 38% QoQ, with an operating margin of 80%. Growth was driven primarily by the full-scale ramp-up of HBM4 shipments and higher server DDR5 volumes, along with continued expansion of enterprise SSDs based on 321-layer TLC NAND. The company expects supply shortages to persist through 2030.



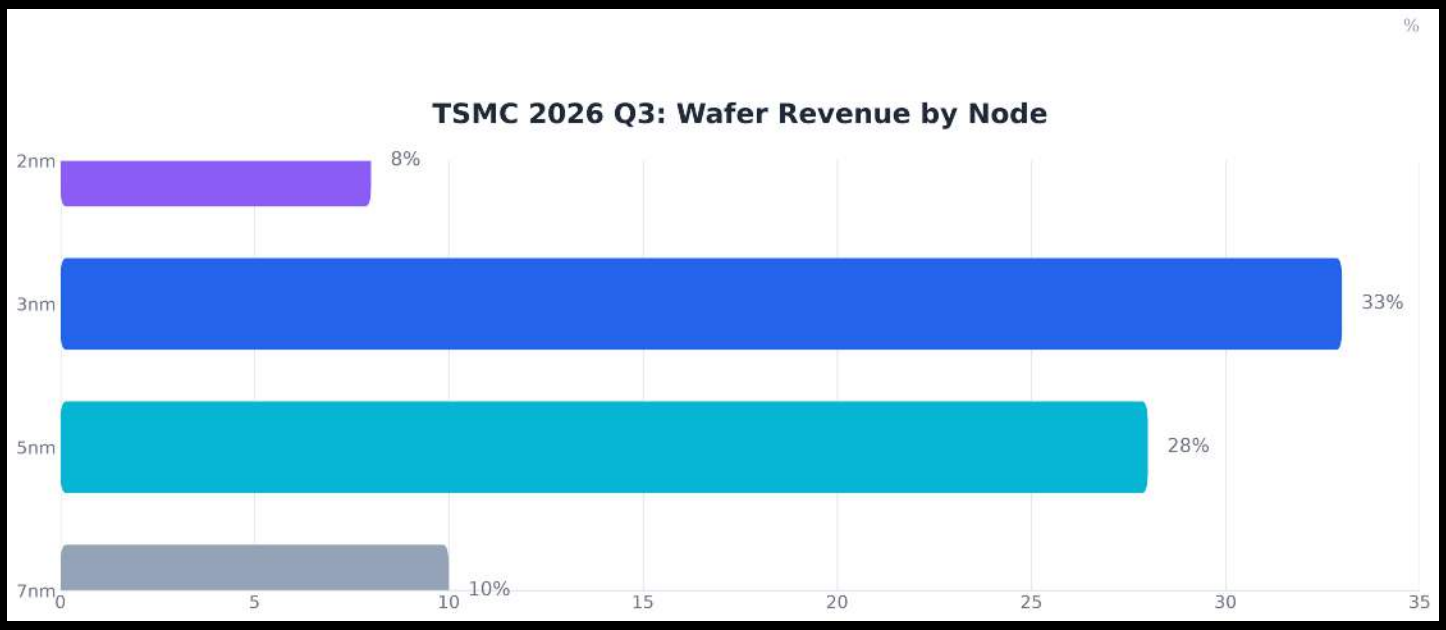
2.1.2 Texas Instruments: Q3 Revenue Reaches USD 6.055 Billion, With Q4 Guidance of USD 5.8–6.3 Billion

Texas Instruments reported its third-quarter 2026 results on October 21, U.S. Eastern Time. Revenue reached USD 6.055 billion, up 28% YoY and 11% QoQ; operating profit rose 73% YoY to USD 2.874 billion, while net income increased 78% YoY to USD 2.425 billion. Diluted earnings per share were USD 2.62. Both major segments grew, with Analog revenue increasing 32% YoY to USD 4.911 billion and Embedded Processing revenue rising 21% to USD 858 million. Quarter-end inventory stood at USD 4.7 billion, with inventory days declining by two days QoQ to 194. The company guided Q4 revenue of USD 5.8–6.3 billion and EPS of USD 2.45–2.79, with the revenue midpoint of USD 6.05 billion broadly unchanged from Q3.



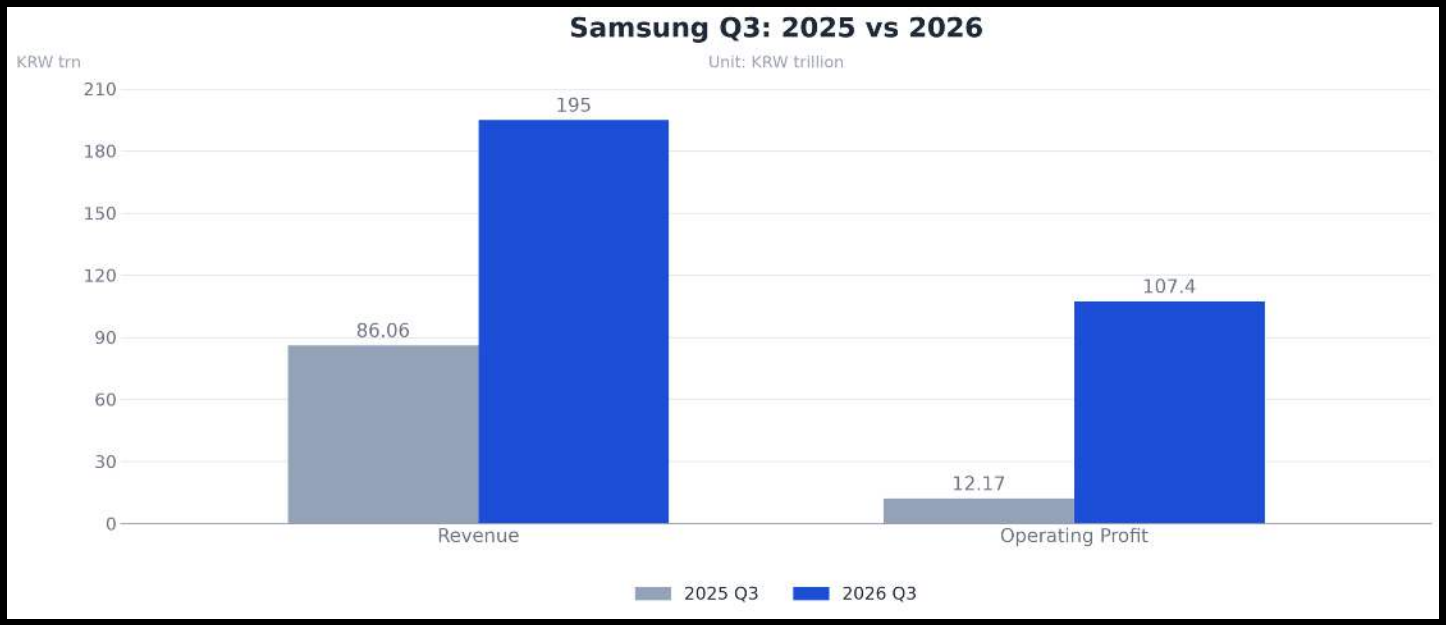
2.1.3 TSMC: Q3 Revenue Reaches USD 46.72 Billion, With 2nm Accounting for 8% of Wafer Revenue

TSMC's third-quarter revenue reached TWD 1,494.24 billion, up 50.9% YoY and 17.6% QoQ, equivalent to USD 46.72 billion, up 41.2% YoY and 16.2% QoQ. Gross margin was 66.4%, operating margin 58.7% and net profit margin 51.1%. Net income increased 68.7% YoY to TWD 763.06 billion (USD 23.48 billion), with EPS of TWD 29.43 (USD 0.91). According to the company's disclosed technology breakdown, 2nm accounted for 8% of wafer revenue, 3nm for 33%, 5nm for 28% and 7nm for 10%. Advanced technologies, defined as 7nm and below, contributed 79% in total. Q4 guidance calls for revenue of USD 52.3–54.3 billion and a gross margin of 65%–67%.



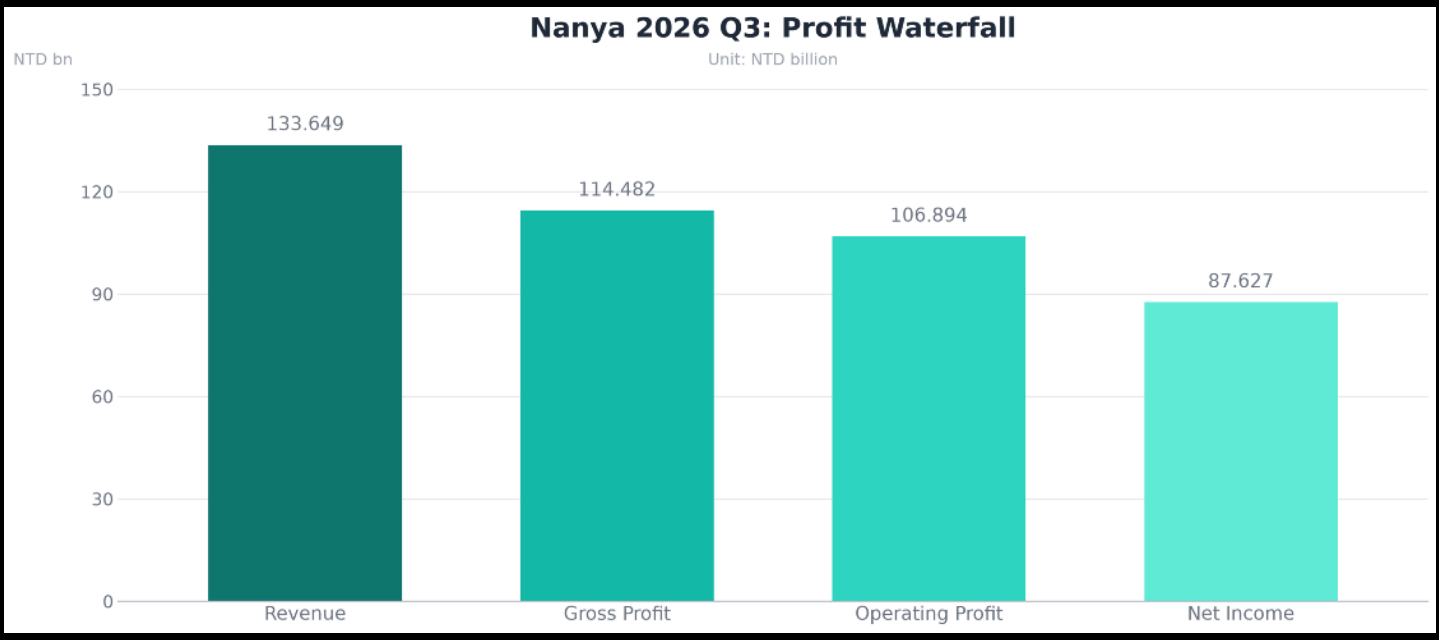
2.1.4 Samsung Electronics: Q3 Earnings Guidance Puts Operating Profit at Approximately KRW 107.4 Trillion (USD 80.31 Billion)

On October 8, Samsung Electronics issued its third-quarter 2026 earnings guidance under Korean International Financial Reporting Standards (K-IFRS), projecting revenue of approximately KRW 195 trillion (USD 145.82 billion), up 127% YoY, and operating profit of approximately KRW 107.4 trillion (USD 80.31 billion), up 782.5% YoY. As Korean disclosure regulations do not permit earnings estimates to be presented as ranges, the published figures represent the midpoints of estimated revenue of KRW 194–196 trillion (USD 145.07–146.57 billion) and operating profit of KRW 107.3–107.5 trillion (USD 80.24–80.39 billion). The guidance provides no segment breakdown. This marks the first time a Korean company's quarterly operating profit has exceeded KRW 100 trillion (USD 74.78 billion). For comparison, Q3 2025 revenue was KRW 86.06 trillion (USD 64.35 billion), with operating profit of KRW 12.17 trillion (USD 9.10 billion).



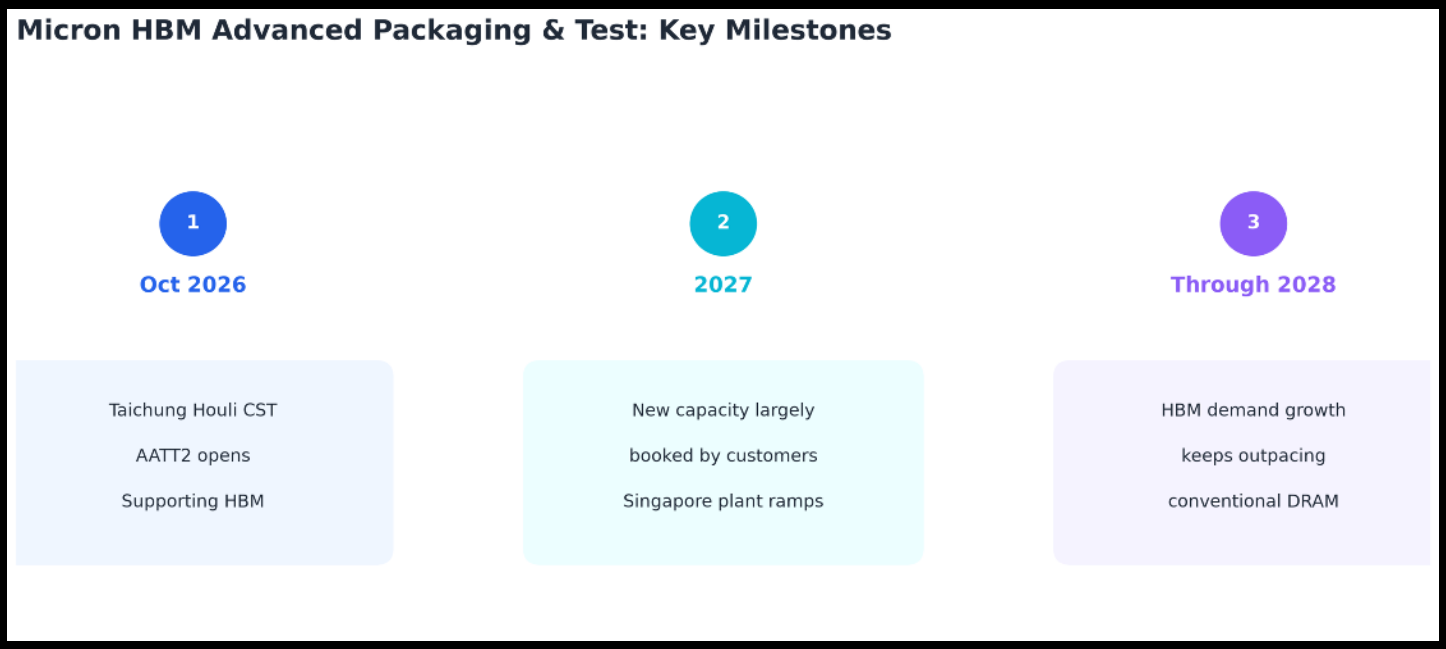
2.1.5 Nanya Technology: Q3 Revenue Reaches TWD 133.649 Billion (USD 4.11 Billion), With an 85.7% Gross Margin

Nanya Technology reported third-quarter revenue of TWD 133.649 billion (USD 4.11 billion), up 611.7% YoY and 61.9% QoQ. Gross profit reached TWD 114.482 billion (USD 3.52 billion), with gross margin rising 6.2 percentage points QoQ to 85.7%. Operating profit was TWD 106.894 billion (USD 3.29 billion), with operating margin increasing 6.3 percentage points QoQ to 80.0%. Non-operating income totaled TWD 2.438 billion (USD 75.03 million). Net income after tax reached TWD 87.627 billion (USD 2.70 billion), up 5,474% YoY and 117.2% QoQ, with a net profit margin of 65.6% and EPS of TWD 25.40 (USD 0.78).



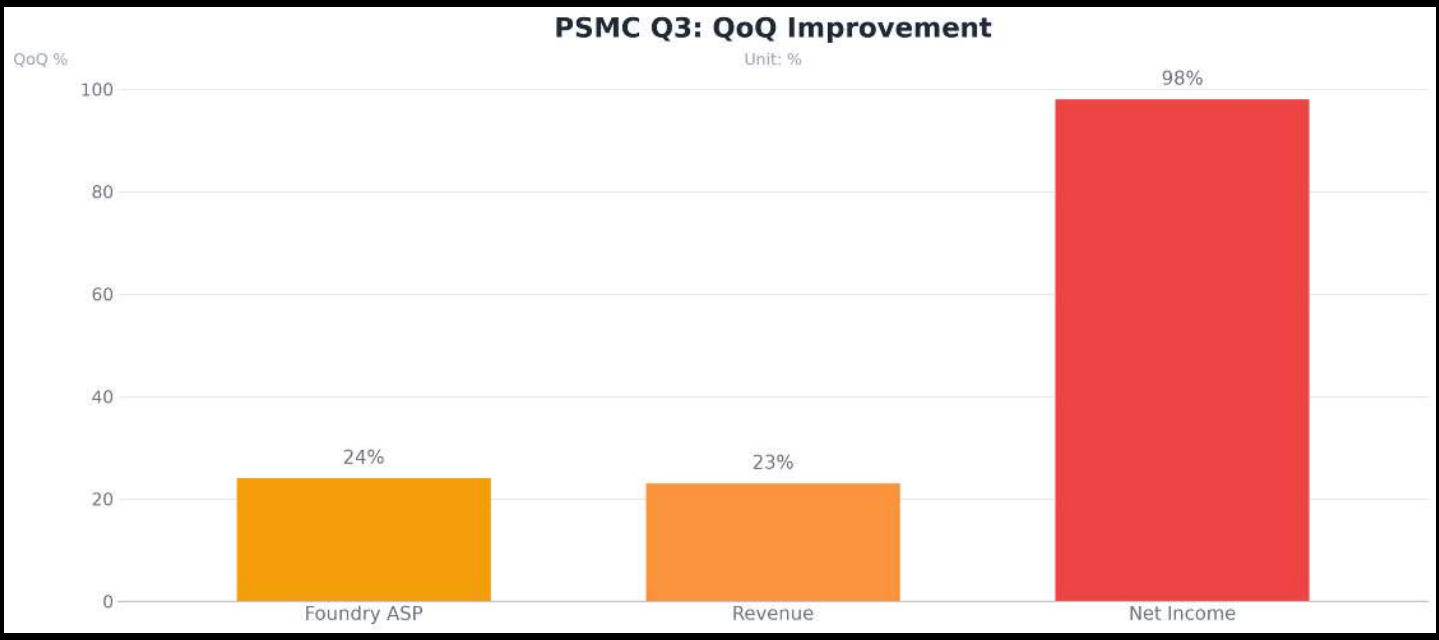
2.1.6 Micron: Second Advanced Assembly and Test Facility Opens in Taichung, With 2027 HBM Capacity Fully Booked

Micron opened Micron Advanced Assembly and Test Taiwan 2 (AATT2) at the Central Taiwan Science Park in Houli, Taichung. Its second advanced assembly and test facility in Taiwan will support HBM packaging and testing. Micron President and Chief Operating Officer Manish Bhatia said AI-driven HBM demand remains strong, with the new facility's 2027 capacity largely reserved by customers. HBM demand growth is expected to continue outpacing conventional DRAM through 2028. Alongside AATT2, Micron's HBM advanced packaging facility in Singapore is expected to begin contributing capacity in 2027, supporting continued market growth in the AI era.



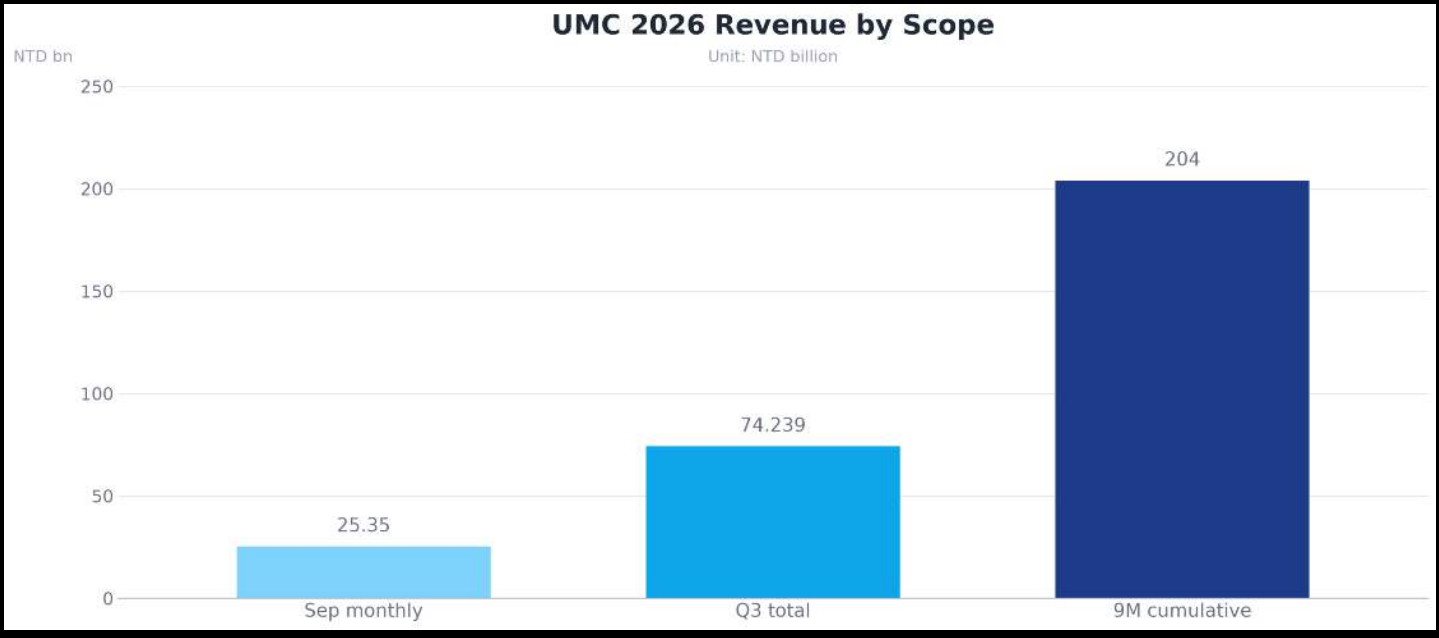
2.1.7 PSMC: September Revenue Hits a Record TWD 7.665 Billion (USD 235.90 Million), Following Two Wafer Price Increases This Year

Powerchip Semiconductor Manufacturing Corporation (PSMC) reported third-quarter consolidated revenue of TWD 21.342 billion (approximately USD 654.3 million), up 23% QoQ and 80% YoY, with net income of TWD 6.5 billion (USD 200.05 million), up 98% QoQ. Gross margin rose from 28% in Q2 to 48%, while capacity utilization reached 97%. Revenue for the first nine months totaled TWD 52.2 billion (USD 1.61 billion), up 52.5% YoY. According to the company's disclosures, the margin improvement reflected a 24% QoQ increase in foundry average selling prices, higher capacity utilization and optimized production scheduling.



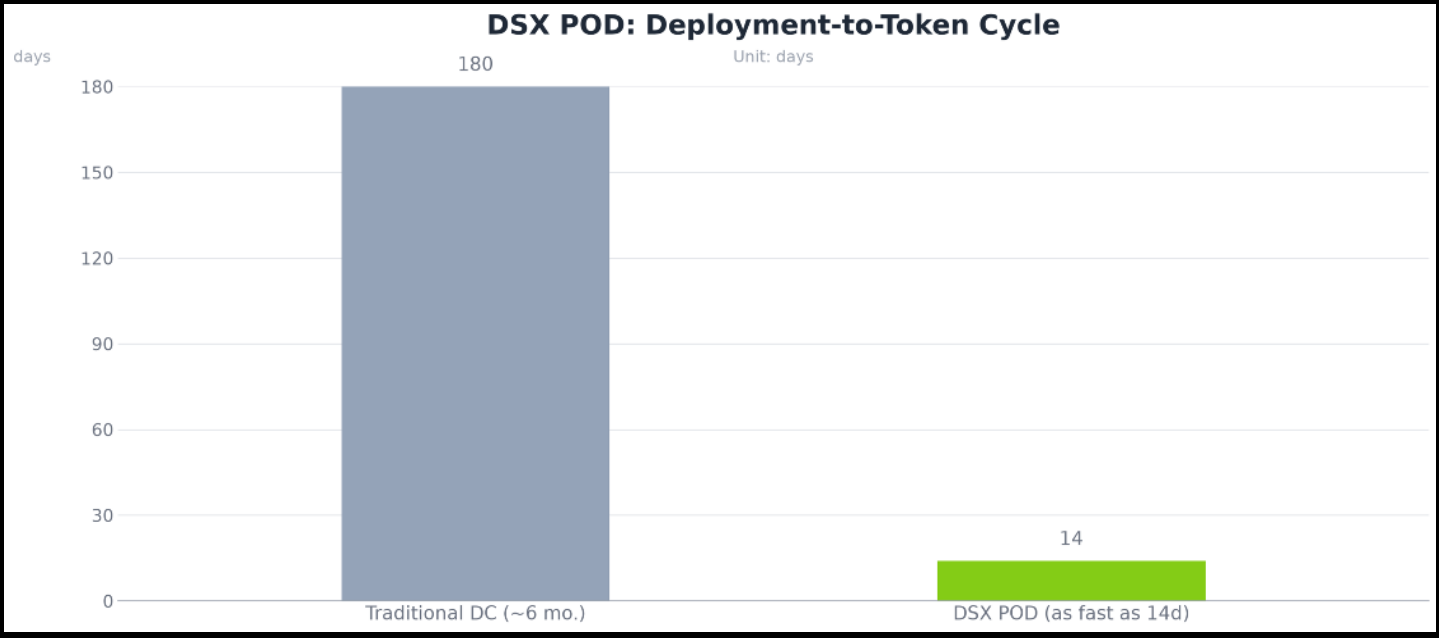
2.1.8 UMC: September Net Sales Reach a Monthly Record of TWD 25.350 Billion (USD 780.18 Million)

United Microelectronics Corporation (UMC) reported record September consolidated revenue of TWD 25.350 billion (USD 780.18 million), up 1.2% MoM and 27.2% YoY, marking seven consecutive months of growth. Third-quarter consolidated revenue reached TWD 74.239 billion (USD 2.28 billion), its highest quarterly level in nearly four years, up 8% QoQ and 25.5% YoY. Consolidated revenue for the first nine months increased 16% YoY to TWD 204 billion (USD 6.28 billion), the highest total for the corresponding period in nearly four years.



2.1.9 NVIDIA: DSX POD Unveiled at GTC Berlin, Cutting Deployment Time to as Little as 14 Days

During his GTC Berlin keynote, NVIDIA CEO Jensen Huang unveiled DSX POD, an AI factory reference design built inside modular containers and fully integrated and validated before delivery. Global deliveries are scheduled to begin in early 2027. Huang said DSX POD could reduce the time from deployment to token generation from six months for a conventional data center to as little as 14 days, describing it as a transformation of the supply chain.



2.1.10 Microchip Technology: VORAGO Acquisition Completed, Expanding Aerospace and Defense Chip Portfolio

On October 9, Microchip Technology announced the completion of its acquisition of VORAGO Technologies, a privately held company based in Austin, Texas, specializing in radiation-hardened and radiation-tolerant microcontrollers (MCUs) and microprocessors (MPUs). Financial terms were not disclosed. Microchip said the acquisition adds a full family of radiation-hardened MCUs and MPUs, together with VORAGO's patented HARDSIL process technology, expanding its presence in the aerospace, defense and space markets.





03

End-Market Updates

3. End-Market Updates Overview

Category	Updates	Insight
Artificial Intelligence	Meta reported third-quarter revenue of US$64.6 billion, up 26% year-on-year, and raised its 2026 AI capital expenditure guidance to US$135–145 billion, further ramping up investment in AI infrastructure.	Continued investment in massive GPU clusters and custom chip development is driving demand for AI accelerator cards, HBM, servers, and power supplies.
Artificial Intelligence	Amazon CEO Andy Jassy said AWS's cloud capacity for 2027 is largely sold out, with capital expenditure expected to reach approximately US$220 billion in 2026.	Cloud providers' capital expenditure remains elevated, strengthening the demand outlook for AI servers, GPUs, switching chips, and high-speed optical transceivers.
Artificial Intelligence	Google is funding approximately US$600 million to expand power grid infrastructure and energy storage for its Arkansas data center.	Data center development is expanding from "building servers" to "building power grids," driving demand for energy storage cells, power semiconductors, and power transmission and distribution components.
Automotive	BYD said France is among the candidate locations for its European manufacturing expansion, with plans to build two additional vehicle assembly plants.	The expansion of local production capacity in Europe is driving regional sourcing and qualification demand for automotive-grade MCUs, power devices, and sensors.
Robotics	Tesla's first batch of production-grade Optimus humanoid robots has rolled off the line in Fremont, marking the start of early-stage mass production.	The start of mass production for humanoid robots is driving demand for dexterous hands and joint actuators, servo systems and reducers, vision and torque sensors, batteries, and AI chips.
Industrial	Siemens has partnered with NVIDIA to implement AI-powered autonomous manufacturing at its Erlangen factory.	The growing adoption of industrial AI and digital twins is driving demand for edge computing, industrial sensors, machine vision, and power devices.

3.1 Artificial Intelligence

3.1.1 Meta's Q3 Revenue Up 26%; 2026 Capex Guidance Raised to US$135–145 Billion

Meta reported Q3 2026 revenue of US$64.601 billion, up 26% year-on-year, and forecast Q4 revenue of US$73–76 billion. Its core AI agent, Muse, surpassed 10 million registered users in the US and Canada within roughly six weeks of launch. Meta expects AI to generate incremental revenue from 2027 and plans to redirect some Reality Labs investment toward AI. To support AI growth and computing infrastructure, Meta raised the lower end of its 2026 capex guidance by US$5 billion to US$135–145 billion. Q3 capex reached US$34.91 billion, supporting continued AI commercialization and infrastructure expansion.

3.1.2 AWS's 2027 Cloud Capacity Largely Sold Out; 2026 Capex at About US$220 Billion

In an October 23 a16z video podcast, Amazon CEO Andy Jassy said AWS's main computing capacity for 2027 is largely sold out amid surging AI infrastructure demand, with substantial orders extending into 2028. Despite raising its 2026 capex plan from approximately US$200 billion to US$220 billion, Amazon still cannot meet all customer demand.

3.1.3 Google to Fund About US$600 Million in Data Center Grid and Energy Storage Expansion

Google and Entergy Arkansas expanded their partnership, with Google funding approximately US$600 million in grid upgrades and clean energy infrastructure for its West Memphis data center. Projects include 1,000 MWh and 400 MWh battery storage systems near Driver Solar and Hot Springs, respectively; a 440 MW Big Island solar power purchase agreement; expansion of the Galet substation; and two 230 kV transmission lines. The facilities are expected to enter service in 2028. Google will cover all additional power supply costs, avoiding passing expansion costs to consumers. Entergy estimates this will save other customers at least US$500 million over 20 years.

3.2 Automotive

3.2.1 BYD Considers French Plant; Hungary Factory to Begin Mass Production in Q4

At the Paris Motor Show, BYD Executive Vice President Stella Li told BFM Business that France is being considered for one of two additional European factories, with competitive energy prices a key factor. She confirmed that the Szeged plant in Hungary, BYD's first passenger vehicle manufacturing facility in Europe, is scheduled to begin mass production in Q4 2026.

3.3 Robotics

3.3.1 Tesla Optimus Enters Early Production at Fremont

Tesla confirmed in its Q3 earnings report that Optimus has entered an early production ramp at its Fremont, California factory. The first production-grade robots have rolled off the line, validating the manufacturing process for commercial products.

A second Optimus line in Texas remains under construction, with a long-term designed capacity of 10 million units annually. Fremont's planned annual capacity is 1 million units, targeting approximately 20,000 robots per week in 2027.

3.4 Industrial

3.4.1 Siemens and NVIDIA Advance AI-Powered Autonomous Manufacturing

Siemens and NVIDIA unveiled new AI and digital twin solutions at Siemens' Erlangen electronics factory to accelerate production launches and enable more adaptive production planning. Siemens plans to invest €500 million in the site's transformation by 2030. The factory already uses 100 AI algorithms across production, logistics, inspection, and maintenance. Virtual production preparation cuts engineering effort for new PCBs by up to 85% and time to market by 40%, while AI agent-driven production planning can deliver additional cost savings of up to 20%.



04

Memory Market Trends

4. Memory Market Trends

4.1 Memory Market Overview

- **DRAM Contract:** Major suppliers' mature-node phaseouts tighten DDR4 supply, supporting moderate consumer DRAM price increases this quarter.

- **DRAM Spot:** DDR4/DDR5 trading remains thin; weak demand and typhoon disruptions limit selective price gains.

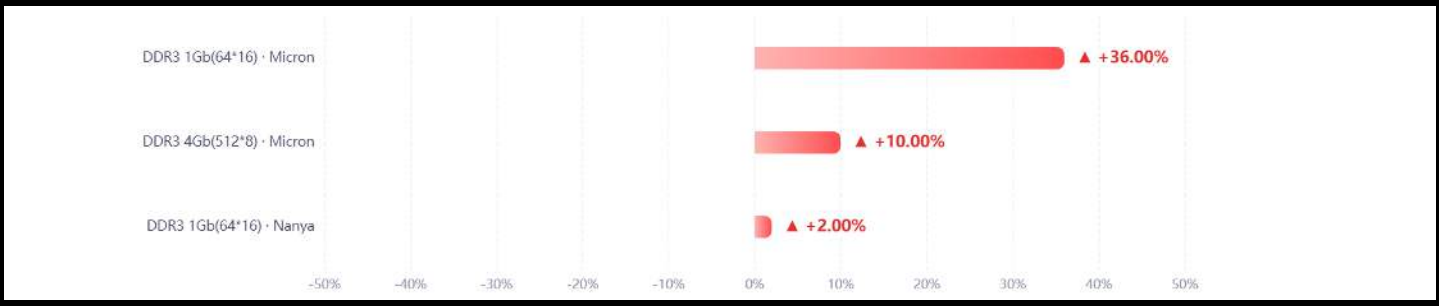
- **NOR Flash:** High-density prices rise 90%–110% in H2; low-density gains ease to 10%–20% in Q4, with prices stabilizing at elevated levels.

- **HDD:** Strong high-capacity nearline demand and supply shortages push prices higher.

4.2 Memory Category / Brand Spot Market Price Trends

DRAM Chips (DDR3): Selected Low-Density Specifications See Price Increases

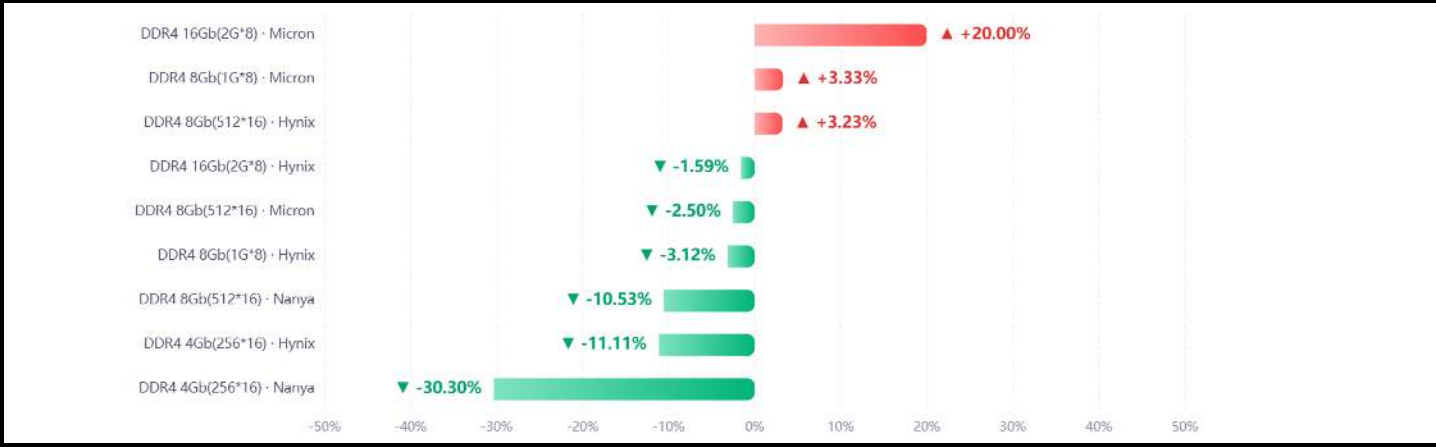
DDR3 quotes this month show low-density specifications leading price increases, with a wider range of gains, while high-density specifications follow with modest increases.



DRAM Chips · DDR3 · Price Change Ranking (%) — Price changes by model from September to October; increases to the right, decreases to the left.

DRAM Chips (DDR4): Mixed Price Movements, with Clear Divergence in Mid- and Low-Density Segments

DDR4 prices this month show mixed trends at higher densities and declines in mid- and low-density chips. Lower-density chips saw sharper corrections, further widening the price gap between high- and low-density chips.



DRAM Chips · DDR4 · Price Change Ranking (%) — Price changes by model from September to October; increases to the right, decreases to the left.

DDR5 Memory Modules: Mixed Price Adjustments in High-Capacity Server Modules

Price changes this month are concentrated in high-capacity DDR5 server modules. Overall, prices are consolidating at elevated levels, with quotes diverging within this segment and increases moderating significantly from earlier levels.



DDR5 Memory Modules · Price Change Ranking (%) — Price changes by model from September to October; increases to the right, decreases to the left.

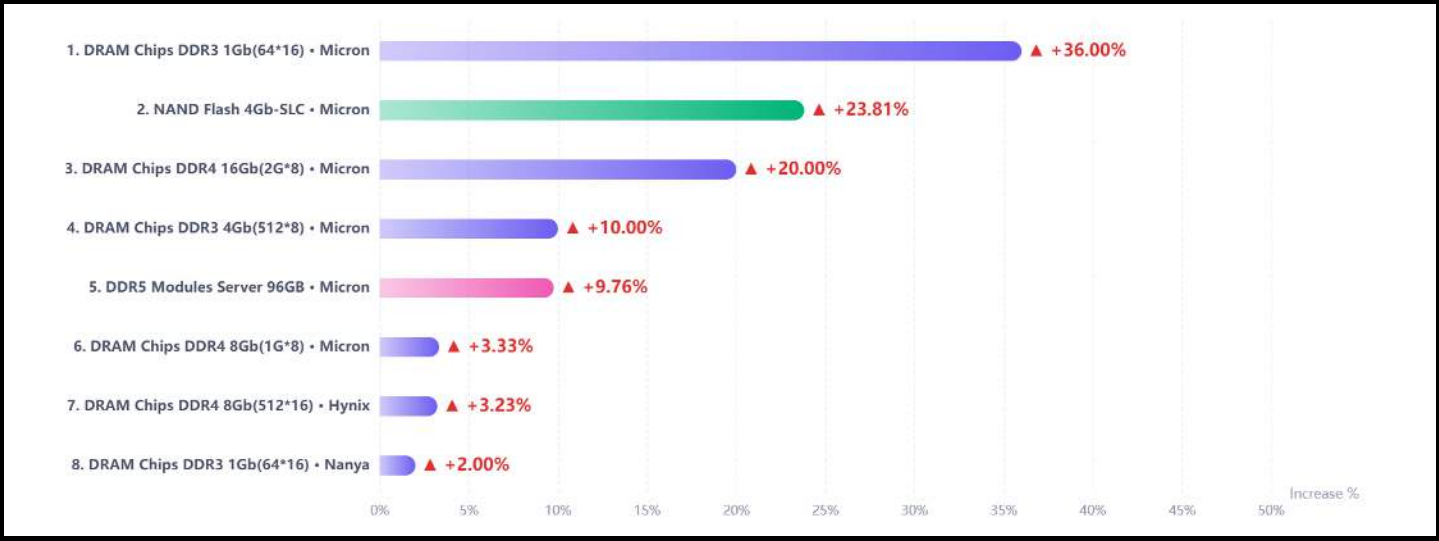
NAND Flash: SLC Prices Diverge by Density; 4Gb Rises While Lower Densities Decline

NAND Flash prices diverged by density this month, with higher densities moving in the opposite direction to mid- and lower densities. No clear overall trend has emerged.



NAND Flash · Price Change Ranking (%) — Price changes by model from September to October; increases to the right, decreases to the left.

Top 8 Price Gainers – October



Ranked by price increase from September to October; figures on the right show the percentage increase.

*Data as of October 2026. Prices fluctuate significantly with supply and demand; figures are for reference only.

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Briocean

STAY AHEAD OF SHORTAGES POWERED BY BIP

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