



Market Insights

Q22024



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General Market Insight

Semiconductor Industry Market Outlook

Semiconductor Market Forecast Summary

The World Semiconductor Trade Statistics (WSTS) anticipates robust growth in the global semiconductor market, projecting a **16% increase in 2024 with an estimated market valuation of US\$611 billion**, driven mainly by significant gains in Logic and Memory sectors. The Americas and Asia Pacific are expected to see the most substantial growth, while Europe and Japan show minimal growth and a slight decline, respectively. For 2025, WSTS forecasts a continued solid growth of 12.5 percent, reaching US\$687 billion, again led by the Memory and Logic sectors, with all regions poised for expansion.

Spring 2024	Amounts in US\$ M			Year on Year Growth in %		
	2023	2024	2025	2023	2024	2025
Americas	134,377	168,062	192,941	-4.8	25.1	14.8
Europe	55,763	56,038	60,901	3.5	0.5	8.7
Japan	46,751	46,254	50,578	-2.9	-1.1	9.3
APAC	289,994	340,877	382,961	-12.4	17.5	12.3
Total World - \$M	526,885	611,231	687,380	-8.2	16.0	12.5
Discrete Semiconductor	35,530	32,773	35,310	4.5	-7.8	7.7
Optoelectronics	43,184	42,736	44,232	-1.6	-1.0	3.5
Sensors	19,730	18,265	19,414	-9.4	-7.4	6.3
Integrated Circuits	428,442	517,457	588,425	-9.7	20.8	13.7
Analog	81,225	79,058	84,344	-8.7	-2.7	6.7
Micro	76,340	77,590	81,611	-3.5	1.6	5.2
Logic	178,589	197,656	218,189	1.1	10.7	10.4
Memory	92,288	163,153	204,281	-28.9	76.8	25.2
Total Products - \$M	526,885	611,231	687,380	-8.2	16.0	12.5

Note: Numbers in the table are rounded to whole millions of dollars, which may cause totals by region and totals by product group to differ slightly.

Source: WSTS Report, June 2024

Electric Car Sales Surge, Set to Reach 17 Million Vehicles in 2024, Driven by Global Growth and Policy Support

17M
EVs in 2024

Electric car sales continue to surge globally, with projections for 2024 reaching around 17 million vehicles, making up more than 20% of total car sales. Major markets like China, Europe, and the US are leading the charge, while emerging economies such as Vietnam and Thailand are also seeing significant growth. Despite challenges such as tight margins and fluctuating battery prices, the market is bolstered by increasing competition, policy support, and falling prices. In 2023, electric car sales hit nearly 14 million, marking an 18% share of the global market and a 35% year-on-year increase. As the industry progresses, affordability and infrastructure development remain crucial for sustaining this rapid growth.



General Market Insight

Semiconductor Industry Market Outlook

Global PC Market Rebounds Strongly, Surpassing Pre-Pandemic Levels in Q1 2024, IDC Finds

The global traditional PC market achieved a notable 1.5% year-over-year growth in Q1 2024, totaling 59.8 million units, signaling a return to pre-pandemic volumes, reports IDC. After a 13.8% decline in 2023, driven by tightened IT budgets and other factors, the market is expected to grow by 3.4% in 2024 as businesses undertake long-overdue PC refresh cycles and embrace Windows 11. Despite challenges in China, where desktop demand lagged, recovery was buoyed by robust performance in the Americas and EMEA regions. Lenovo maintained leadership among the top 5 vendors, leveraging favorable year-over-year comparisons, while the advent of AI-powered PCs sets the stage for future growth with premium offerings. Shipments anticipated to surpass pre-pandemic levels reaching an estimated 285 million units by 2027.

Top 5 Companies, Worldwide Traditional PC Shipments, Market Share, and Y-O-Y Growth, Q1 2024

Company	1Q24 Shipments	1Q24 Market Share	1Q23 Shipments	1Q23 Market Share	Y-O-Y Growth
Lenovo	13.7	23.0%	12.7	21.6%	7.8%
HP Inc	12.0	20.1%	12.0	20.4%	0.2%
Dell Technologies	9.3	15.5%	9.5	16.1%	-2.2%
Apple	4.8	8.1%	4.2	7.1%	14.6%
Acer Group	3.7	6.2%	3.4	5.7%	9.2%
ASUS	3.6	6.1%	3.8	6.4%	-4.5%
Other	12.6	21.2%	13.3	22.6%	-5.0%
Total	59.8	100.0%	58.9	100.0%	1.5%

*Preliminary results, shipments are in millions of units
Source: IDC Quarterly Personal Computing Device Tracker, April 8, 2024*

Worldwide PC Device Forecast by Market Segment: Shipments, Y-O-Y Growth, and 2023-2027 CAGR

Segment	2023 Shipments	2023/2022 Growth	2027 Shipments	2027/2026 Growth	2023-2027 CAGR
Consumer	113.9	-14.8%	125.5	1.4%	2.4%
Education	29.6	-15.4%	35.0	0.8%	4.2%
Commercial	108.3	-12.2%	124.6	2.6%	3.6%
Total	251.8	-13.8%	285.0	1.8%	3.1%

*Shipments in Millions
Source: IDC Worldwide Personal Computing Device Tracker, December 21, 2023*



General Market Insight

Semiconductor Industry Market Outlook

Global Smartphone Market Soars 11% in Q1 2024; Samsung Leads with 20% Share

The global smartphone market kicked off 2024 with a robust 11% year-on-year growth in Q1, fueled by recovering consumer demand and a stabilizing economy. Samsung reclaimed the top spot with a commanding 20% market share, driven by strong reception for its Galaxy AI features. Apple followed closely with 16%, navigating challenges in key markets. Xiaomi secured third place at 14%, buoyed by the popularity of its Redmi A3 model. As vendors focus on premium offerings and strategic expansions in emerging markets, the industry anticipates sustained growth amidst cautious inventory management amid global economic uncertainties.

Top 5 Companies, Worldwide Smartphone Shipments, Market Share, and Y-O-Y Growth, Q1 2024

Company	1Q24 Shipments	1Q24 Market Share	1Q23 Shipments	1Q23 Market Share	Y-O-Y Growth
Samsung	60.1	20.8%	60.5	22.5%	-0.7%
Apple	50.1	17.3%	55.4	20.7%	-9.6%
Xiaomi	40.8	14.1%	30.5	11.4%	33.8%
Transsion	28.5	9.9%	15.4	5.7%	84.9%
OPPO	25.2	8.7%	27.6	10.3%	-8.5%
Others	84.7	29.3%	79.0	29.4%	7.2%
Total	289.4	100.0%	268.5	100.0%	7.8%

*Preliminary results, shipments are in millions of units
Source: IDC Quarterly Mobile Phone Tracker, April 15, 2024*

Global Semiconductor Capacity to Surge with AI Demand Driven by China and Leading-Edge Nodes

6%

Projected Fab Capacity Growth in 2024

The global semiconductor industry is set for a robust expansion, with fab capacity anticipated to grow by 6% in 2024 and 7% in 2025, reaching a record 33.7 million 8-inch equivalent wafers per month, according to SEMI. Leading-edge capacity for 5nm nodes and below is projected to rise by 13% in 2024, fueled by AI advancements, with a further boost of 17% in 2025 as manufacturers like Intel, Samsung, and TSMC transition to 2nm Gate-All-Around (GAA) processors. Chinese chipmakers will lead the charge with a 14% increase in capacity by 2025, while the global memory sector, particularly DRAM, is expected to see significant growth due to AI-driven demand for High Bandwidth Memory (HBM).



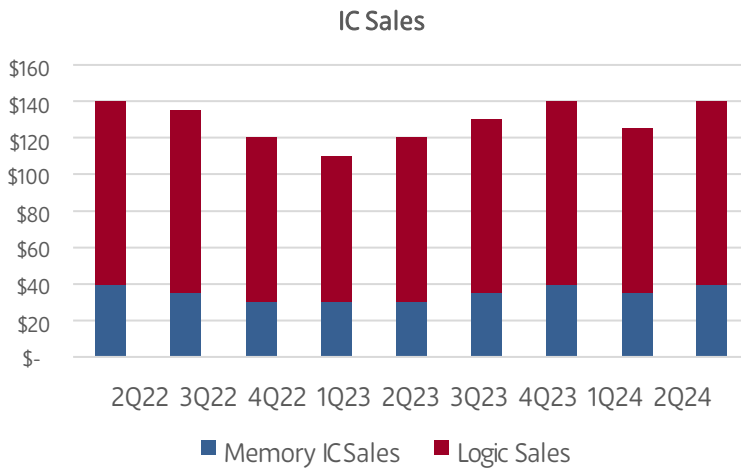
General Market Insight

Semiconductor Industry Market Outlook

Semiconductor Industry Gains Momentum in Q1 2024: IC Sales Surge 22%, Installed Capacity Exceeds 40 Million Wafers per Quarter

The global semiconductor manufacturing industry showed improvement in Q1 2024, with electronic sales rising 1% year-over-year and IC sales surging 22%, according to SEMI's Semiconductor Manufacturing Monitor (SMM) Report. Installed wafer fab capacity increased and is projected to exceed 40 million wafers per quarter. Although memory utilization rates and capital expenditures remained conservative, a recovery is anticipated in the second half of 2024 driven by demand for AI chips and high-bandwidth memory. The SMM report, prepared with TechInsights, highlights trends and forecasts for the semiconductor industry, anticipating stronger growth and a rebound in consumer and automotive markets later in the year.

IC Sales Projected to Recover Strongly by Q2 2024



While both memory and logic IC sales experienced a dip from mid-2022 to early 2023, the market began to recover by the end of 2023. Forecasts for Q1 and Q2 2024 indicate a robust rebound, with total IC sales returning to early 2022 levels. This data suggests a positive outlook for the semiconductor industry, driven by increasing demand and stabilizing market conditions, with strong performance expected in the near term.

We are Rebound:

- > PPV
- > Component Sourcing
- > Data Driven BOM Analytics
- > Nuvonix
- > Obsolescence Management
- > Reverse Logistics
- > Shortage Management





General Market Insight

Semiconductor Industry Market News

DRAM and NAND Flash Prices Surge in Q2 2024

TrendForce's latest report forecasts significant price increases for DRAM and NAND Flash in Q2 2024, with DRAM prices rising by 13-18% and NAND Flash by 15-20%. Initially, more modest increases were expected, but the 4/03 earthquake and subsequent market dynamics have pushed prices higher. Despite weakened demand for notebooks and smartphones, AI applications are driving the market, prompting suppliers to adjust prices upward. Additionally, concerns over potential HBM3e production constraints are influencing buyers to stockpile DRAM and NAND Flash, anticipating future shortages. Energy-efficient QLC enterprise SSDs are also seeing increased demand, further impacting the market.



Forecast Contract Price Increases for DRAM and NAND Flash Products, 1Q24-2Q24

Product	1Q24	2Q24 Initial Estimate	2Q24 Latest Estimate
Total DRAM	Up ~20%	Up 3~8%	Up 13~18% (HBM Penetration Rate 4%)
Total NAND Flash	Up 23~28%	Up 13~18%	Up 15~20%

Source: TrendForce, May 2024

Client and Enterprise SSD Prices Set to Rise in Q2 2024

TrendForce's latest report predicts that client SSD prices will increase by up to 15% in Q2 2024, following a substantial 23-28% rise in Q1. This trend is driven by factors such as reduced stockpiling and strategic buying by SSD makers. Enterprise SSD buyers will face even steeper hikes, with prices expected to surge by 20- 25%, fueled by strong demand from US and Chinese communication service providers and a push to build inventories. Overall, NAND flash products, including eMMC and UFS, are projected to see a 10-15% price increase this quarter.

Price Projections for Different Categories of NAND Flash Products, 1Q24-2Q24

Product	1Q24(E)	2Q24(F)
eMMC UFS	up 25~30%	up 10~15%
Enterprise SSD	up 23~28%	Up 20~25%
Client SSD	up 23~28%	Up 10~15%
3D NAND Wafers (TLC & QLC)	up 23~28%	Up 5~10%
Total NAND Flash	up 23~28%	Up 13~18%

Source: TrendForce, March 2024



General Market Insight

Semiconductor Industry Market Outlook

Semiconductor Inventory Surge Signals Potential Decline Ahead

Recent data indicates an increase in semiconductor industry inventories, particularly among top chip companies amid the AI trend. However, the surge in listed semiconductor firms globally, especially in China, suggests an expansion of the supply chain. Median inventory days for top semiconductor firms peaked in 2023 but have shown signs of decline by May 2024, indicating a potential inventory decrease on the horizon, albeit not uniformly across all segments.

Median inventory days of top 10 chip firms by market value (days)

Segment	2020	2021	2022	2023	May-24
Overall	92.2	90.58	107	140.8	142.16
IDM, IC Design	92.2	80.02	97.25	129.73	137.9
Foundry, IC Backend Houses, Equipment	137.17	125.4	134.97	169.87	151.65

Median inventory days of top 100 chip firms by market value (days)

Segment	2020	2021	2022	2023	May-24
Overall	112.19	105.22	127.12	159.24	161.74
IDM, IC Design	112.19	99.54	126.33	159.79	160.74
Foundry, IC Backend Houses, Equipment	112.26	114.55	132.16	157.7	163.16

Median inventory days of top 100 chip firms based in China (days)

Segment	2020	2021	2022	2023	May-24
Overall	101.82	108.34	180.39	233.6	209.43
IDM, IC Design	103	106.2	192.88	246.14	224.75
Foundry, IC Backend Houses, Equipment	89.03	109.21	129.53	162.44	163.79

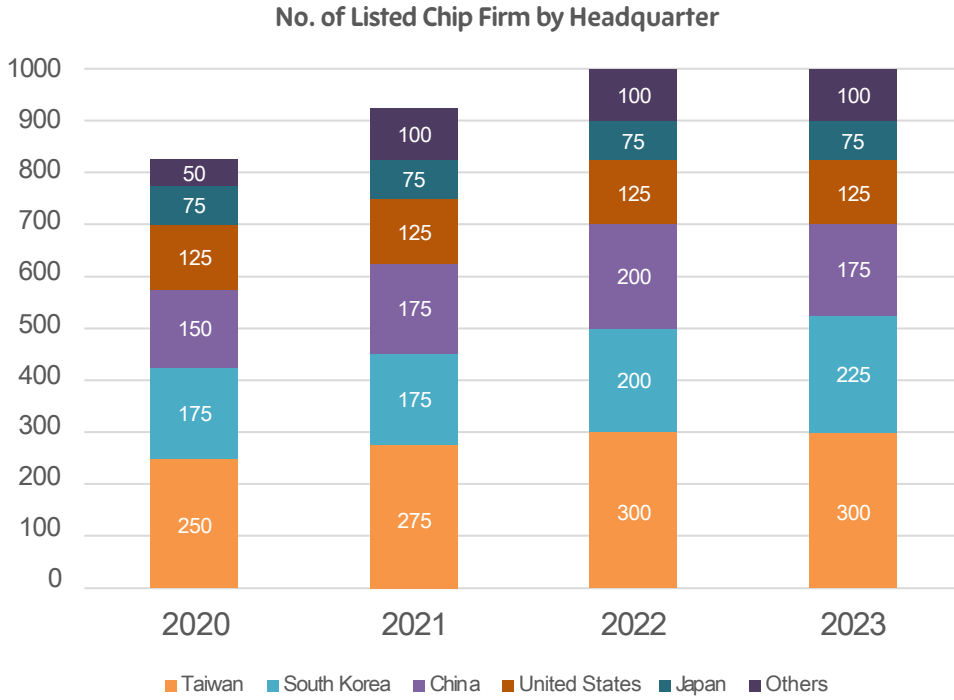
Source: Bloomberg, May 2024



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Semiconductor Industry Market Outlook

Number of Listed Chip Firm by Headquarter



The data indicates a general growth trend in the number of listed chip firms globally, with Taiwan and South Korea leading the growth. China saw growth but had a slight decrease in 2023, while the United States and Japan maintained stable numbers. The category "Others" also experienced growth, particularly in 2021.

Global Reach

Local Support

Rebound Electronics

41 offices in 27 countries, with dedicated purchasing hubs in Asia, Europe & the Middle East.



General Market Insight

Semiconductor Industry Market News

Americas Semiconductor Industry Surge: Major Investments and Strategic Alliances

President Biden has announced a significant \$8.5 billion agreement with Intel to build semiconductor plants across four states, backed by the CHIPS and Science Act, aiming to boost U.S. semiconductor production and create 30,000 jobs. This move aligns with broader economic strategies to strengthen American manufacturing and technology leadership.

Simultaneously, the U.S. and Mexico are collaborating to enhance the semiconductor supply chain, focusing on resilience in sectors like automotive and healthcare. SK hynix is also investing \$4 billion in a new semiconductor facility at Purdue Research Park, Indiana, underscoring U.S. innovation efforts.

Samsung is expanding its semiconductor investment in Texas to \$44 billion, aiming to enter the AI semiconductor market despite high production costs. In parallel, Micron is set to receive \$6.1 billion in federal grants to enhance its manufacturing capabilities in New York and Idaho, furthering U.S. self-reliance in semiconductor production.

Amidst rising U.S.-China tensions, sanctions on Nvidia's Chinese distributor Sitonholy are driving Chinese firms to shift towards domestic alternatives like Huawei's AI chips. Arizona State University is leading breakthroughs in advanced packaging technology for microchips, enhancing performance and securing the supply chain.

In Canada, IBM, in partnership with the federal and Quebec governments, is investing \$187 million CAD to expand semiconductor R&D and packaging capabilities, aiming to position Canada as a leader in the industry.

These collective efforts reflect a robust drive to bolster the semiconductor industry across the Americas, addressing global supply chain vulnerabilities and fostering economic growth and technological competitiveness.

Europe's Semiconductor Landscape Sees Major Investments and Strategic Developments

The UK government has earmarked £16.6 million for semiconductor research focused on electric vehicles (EVs) and clean energy. Led by Innovate UK, this investment aims to advance power electronics crucial for EVs and manufacturing, demonstrating the UK's commitment to innovation and sustainable growth.

However, a report by the Centre for Emerging Technology and Security (CETaS) highlights gaps in the UK's semiconductor strategy. It calls for stronger international partnerships, especially with South Korea, and the creation of a National Semiconductor Institute to address infrastructure deficiencies and improve competitiveness in AI hardware.

In Southern Europe, Portugal's semiconductor industry is booming with international investment and innovation. Companies like Synopsys and PICadvanced benefit from the country's strategic location, skilled workforce, and supportive policies. With \$1.6 billion in new investments, Portugal is set to create thousands of jobs and enhance its role in the global semiconductor market. Collaborations, such as those between GlobalFoundries and Amkor, are strengthening the European semiconductor supply chain, particularly in the automotive sector.



General Market Insight

Semiconductor Industry Market News

Asia Pacific Semiconductor Industry Sees Major Investments and Strategic Developments

The Asia Pacific region is experiencing significant growth in the semiconductor sector, marked by major investments and strategic partnerships.

► Philippines Strengthens US Ties

US Secretary of State Antony Blinken's visit to Amkor Technology Philippines highlights the Philippines' strategic role in the global semiconductor supply chain. The Philippines Economic Zone Authority (PEZA) is committed to enhancing business ties with the US, aiming to attract more industry giants and improve regulatory transparency.

► India Appeals for Singaporean Investment

Indian External Affairs Minister S. Jaishankar urges Singaporean business leaders to invest in India's growing semiconductor industry, emphasizing the nation's efforts to boost manufacturing and self-sufficiency.

► Singapore's First Substrate Plant

Japanese company Toppan is set to establish Singapore's first advanced substrate manufacturing facility, a significant boost to the local semiconductor industry, supported by the Economic Development Board.

► Sony Expands in Thailand

Sony Semiconductor Solutions opens a new fab in Thailand, focusing on image sensors and laser diodes, creating around 2,000 jobs and emphasizing sustainability through renewable energy use.

► TSMC Collaborates with Japan

TSMC partners with Kyushu University to address the semiconductor skills shortage, supporting Japan's efforts to revive its semiconductor industry through joint research and training programs.

► Korea's Output Surge

South Korea's industrial output sees continuous growth, driven by a rebound in the semiconductor sector, reflecting a promising economic recovery.

► Taiwan's Resilience

A 7.4-magnitude earthquake in Taiwan minimally impacts TSMC's operations, highlighting the need for geographical diversification in semiconductor manufacturing.

► Japan's Strategic Investment

Japanese Prime Minister Fumio Kishida visits a new semiconductor plant in Kyushu, backed by a \$7 billion investment to secure chip supplies and reduce import dependency.





General Market Insight

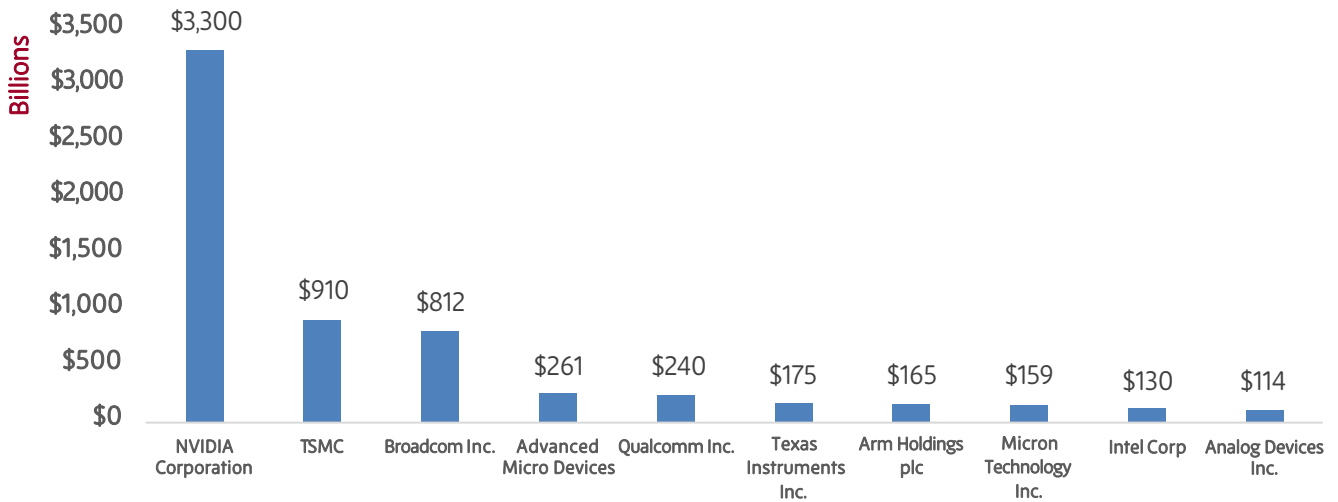
Semiconductor Industry Stocks

Semiconductor Industry Overview (April – June 2024)



Source: TC2000, June 2024

Top 10 Semiconductor Companies by Market Capitalization



Source: TC2000, June 2024

3 Top Semiconductor Stocks to Buy in June 2024

The semiconductor sector has shown strong performance, with the iShares Semiconductor ETF (SOXX) outpacing the S&P 500 and Nasdaq Composite, boasting a 295% gain over five years and 32% year-to-date. Nvidia (NVDA) leads the pack, with its stock surging 153% this year and an impressive 3,000% over five years, driven by substantial revenue and net income growth. Synopsys (SNPS) also stands out, with a 15% year-to-date increase and robust financials, set to benefit further from its upcoming acquisition of Ansys. Qualcomm (QCOM) offers growth at a reasonable price, with a 49% rise this year and promising financial metrics ahead of its Snapdragon X platform launch.



General Market Insight

Latest Updates and News from Industry Leaders

AMD

- Netweb Technologies has launched a series of servers from its manufacturing facility in Faridabad, India, supporting up to 6TB memory and powered by 4th Gen AMD EPYC processors.
- AMD unveiled the Ryzen 9000 series at Computex 2024, featuring Zen 5 architecture, including the flagship Ryzen 9 9950X with 16 cores, up to 5.7 GHz boost clock, and significant IPC improvements over Zen 4, set to launch in July 2024 on AM5 socket with DDR5 support and enhanced performance features.

Analog Devices

- Nomura Holdings Inc. invested \$6.41 million in Analog Devices, Inc. by purchasing 32,258 shares in Q4, while other institutional investors and hedge funds also increased their positions, indicating strong interest and confidence in the semiconductor company.
- Analog Devices, Inc. (ADI) and the BMW Group announced the adoption of ADI's 10BASE-T1S Ethernet technology for automotive ambient lighting systems, enhancing software-defined vehicle capabilities.
- Analog Devices, Inc. (ADI) has received FDA 510(k) clearance and launched the Sensinel™ Cardiopulmonary Management (CPM) System, a wearable device for remote monitoring of cardiopulmonary health, aimed at improving chronic disease management like heart failure, reducing hospitalizations, and lowering healthcare costs.

Broadcom

- Broadcom has launched Automic® Automation as a Software as a Service (SaaS), offering advanced workload automation and orchestration capabilities across mainframe, distributed, and hybrid cloud environments, while reducing infrastructure costs and freeing resources for strategic projects.
- Broadcom has launched a new VMware partner sales, distribution, and support program in Europe, signing up over 50 VMware Cloud Service Providers (VCSP) as "Pinnacle Partners" to deliver VMware's reconfigured services and support sovereign cloud solutions, despite concerns from long-time VMware customers and distribution partners about the changes and increased licensing costs.
- Broadcom surpassed analysts' projections in its second fiscal quarter with adjusted earnings per share of \$10.96 (vs. expected \$10.84) and revenue of \$12.49 billion (vs. expected \$12.03 billion), and also announced a 10-for-1 stock split effective July 15, triggering a 10% increase in its stock price in after-hours trading.

Diodes Inc.

- Diodes Incorporated introduces the PI3WVR41310, a 13.5Gbps high-speed video switch designed for next-generation commercial displays, gaming monitors, and embedded applications, offering 3:1 multiplexing or 1:3 demultiplexing capabilities, low insertion loss, wide signal-voltage range, and features such as DDC/AUX and HPD pins for seamless device connectivity, available at \$1.65 per unit in 3,500-piece quantities.
- The AH1899A/B/S Hall-effect switch ICs feature ultralow-voltage operation from 1.1V to 2.0V, internal pull-up and pull-down capability, and utilize a hibernating clocking system to minimize power consumption, designed for portable and battery-powered equipment with the AH1899A/AH1899B consuming only 0.95µA at 1.2V and the AH1899S offering higher sensing frequency at 5.1µA, boasting superior temperature stability and ESD protection up to 8kV.

Infineon

- Infineon plans to establish a \$37 million R&D center in Taiwan, funded in part by the government, focused on developing next-generation Wi-Fi and Bluetooth chips for electric vehicles under Taiwan's "A+ Global Innovation Partnership Initiative Program," aiming to bolster local technology advancement and support suppliers.
- Infineon is advancing its silicon carbide (SiC) technology to enhance three-phase hybrid inverters for solar power applications, aiming to reduce filter inductance size, weight, and costs while enabling fanless designs. Their second-generation SiC technology promises improved efficiency and performance benchmarks, supporting solar self-consumption and integration with energy storage systems, thereby optimizing material usage and space by up to 40% in PV systems up to 30 kW output power.



Intel

- Intel has unveiled its Intel 3 process node, boasting an 18% performance increase at the same power compared to Intel 4, along with a 10% higher transistor density. This new node, part of Intel's 5N4Y strategy, introduces improvements like enhanced transistor drive current and increased EUV utilization, with variants tailored for different applications including server processors and AI/HPC solutions, now shipping with the Xeon 6 CPUs.
- Intel is transporting a massive 916,000-pound "super load," a cold box for semiconductor fabrication, across Ohio over nine days, causing significant traffic disruptions as part of its construction of a new \$28 billion campus in New Albany. The project aims to establish a leading-edge semiconductor facility, creating jobs and investing in local education to support future workforce needs in the region.
- Intel is reportedly pausing its \$25-billion chip plant plans in Israel amid evolving market conditions, despite prior government support, while reaffirming commitment to its existing operations in the region.

Kyocera

- Kyocera AVX has begun building a 49,000-square-foot center for low-noise quartz crystal frequency control products at Penn State Erie's Knowledge Park, set to open in April 2025, enhancing collaboration with Penn State Behrend and production for military, aerospace, and commercial uses.
- KYOCERA AVX launches the 9169-000 Series wire-to-board card-edge connectors featuring solderless insulation displacement and beryllium copper compression contacts for reliable high-signal-integrity connections in harsh environments, available in various configurations and colors.
- Kyocera's Fine Cordierite ceramic mirror, chosen for its low thermal expansion, high mechanical strength, long-term dimensional stability, and radiation resistance, has been installed for the first time on the ISS's experimental optical communication equipment, enhancing high-speed, high-capacity data transmission between the ISS and Earth.

Lattice

- Lattice Semiconductor shares fell 6.45% after a 17% Q1 revenue decline, but analysts remain optimistic about future recovery and new product ramps.
- Lattice has launched new AI tools for performance management and employee surveying, enhancing productivity for HR professionals and managers. The new features include "key driver analysis," which synthesizes survey data themes, and a performance summarization tool that compiles peer reviews for managers.

Murata

- Murata Electronics (Thailand) establishes key MLCC production base in Lamphun with plans to double capacity, aiming for global export to meet increasing demand from 5G and electronic devices.
- Apple, along with TSMC and Murata, expands its Restore Fund with a combined investment of \$280 million to co-fund natural carbon neutralization projects, aiming for high-quality carbon removal and ecosystem protection as part of Apple's 2030 carbon neutrality goal.
- Murata and Michelin have signed a license agreement to integrate RFID tags into automotive tires, enhancing tire management and traceability in Europe and beyond, with mass production set to begin in January 2025.
- Sendai Murata Manufacturing Co., Ltd., a subsidiary of Murata Manufacturing Co., Ltd., will shift to 100% renewable energy starting from April 1, aligning with Murata Manufacturing Group's commitment to the RE100 initiative. The plant also plans to install a storage battery system in summer 2022 to optimize energy management across its production operations.

Nexperia

- Nexperia introduces automotive-qualified 650V SC Schottky diodes in R2P DPAK packaging, expanding their application to electric vehicles and other automotive sectors, with additional industrial-grade options available in various packaging types for broader high-power applications.
- Nexperia, a Chinese-owned semiconductor firm in the Netherlands, faced a ransomware attack with leaked documents on a darknet site; Fox-IT is investigating amid ongoing details secrecy, following prior controversies over its Newport Wafer Fab acquisition and sale amid UK security concerns.



NVIDIA

- Nvidia has surpassed Microsoft in market cap to become the world's most valuable public company, driven by its leadership in AI chips and significant stock appreciation.
- NVIDIA is set to launch its GeForce RTX 5000 Series "Blackwell" graphics cards in early 2025, featuring models like the RTX 5090 and RTX 5050 with new GDDR7 VRAM technology offering improved performance and energy efficiency over GDDR6X. The leaked details also indicate updates to older models like the RTX 2050, RTX 3050, and RTX 4050, potentially lowering prices for budget gaming laptops.

NXP

- NXP Semiconductors launched "QSea I," Germany's first quantum computing demonstrator, in partnership with eleQtron, ParityQC, and Q&R Quantum Computing, marking its 100th anniversary in Hamburg and supporting the Hamburg Quantum Computer Initiative to advance quantum technology, strengthen local expertise, and bolster digital sovereignty in Germany and the EU.
- VS and NXP Semiconductors are forming a joint venture, VisionPower Semiconductor Manufacturing Company (VSMC), to build a USD 7.8 billion 12-inch fab in Singapore, expected to start production in 2027.
- NXP anticipates a significant increase in semiconductor demand by late 2024 and early 2025 and urges customers to provide extended and detailed order visibility and maintain adequate inventory levels to prevent shortages. The company expects strong growth in the industrial and automotive sectors, driven by advancements in Software Defined Vehicles, ADAS, and Electrification, with an overall market growth forecasted at 8% for 2025. To ensure business continuity and avoid supply chain disruptions, NXP requests customers maintain a 12-week product buffer and submit EDI forecasts/orders through the end of 2025.

Onsemi

- Onsemi plans a \$2 billion investment in Czech Republic's Roznov pod Radhostem for silicon carbide semiconductor production, marking the largest foreign direct investment in Czech modern history, aiming to boost EU's semiconductor self-sufficiency in sectors like automotive and renewables by 2027.
- The company announced that it will cut 1,000 jobs globally and consolidate nine sites to streamline operations and reduce costs amid sluggish demand for chips, particularly in the electric vehicle market. The company plans to incur \$65 million to \$80 million in employment-related charges through 2025, reinvesting savings into new business initiatives.
- Onsemi, a semiconductor company, is closing its office in South Portland and cutting 53 positions related to older product lines, while offering relocation opportunities within the company to affected employees, as part of efforts to enhance innovation and organizational efficiencies for future growth.

Panasonic

- Panasonic Automotive's major shareholder will shift to Apollo, holding 80% of shares, as Panasonic Holding Corporation reduces its stake to 20%, aiming to enhance focus on electric vehicles and automotive system evolution.
- Panasonic's Toughbook 40 Mk2, priced at \$4,699, offers Intel Core Ultra processors, up to 64GB RAM, 4TB SSD, MIL-STD-810H, MIL-STD-461H, and IP66 certifications, tailored for rugged environments with Wi-Fi 7, Bluetooth 5.3, 4G/5G, and a 14-inch touchscreen with 1200 nits brightness.

Rapidus

- Rapidus plans to open a \$32 billion 2-nm pilot fab in April 2025, using single-wafer processing to compete with TSMC and Samsung, supported by IBM and imec for commercial production in AI chip design and high-performance computing with integrated fabrication and packaging. Supported by a consortium including Toyota and Sony and backed by Japanese government funding.
- Rapidus Corporation and Hokkaido University have partnered to boost Japan's semiconductor industry through joint education, research, and technology initiatives, focusing on training, advanced research, and shared facilities to support Rapidus' 2nm semiconductor development.



Renesas

- Renesas Electronics has started operations at its Kofu Factory in Japan, now a dedicated 300-mm wafer fab for power semiconductors, following a 90-billion-yen investment to reopen in May 2022 and doubling production capacity by 2025 to meet rising demand from the electric vehicle sector.
- The RC323xxA from Renesas is a versatile, high-performance jitter attenuator and clock synthesizer supporting network synchronization and ultra-low jitter outputs, ideal for telecom, datacenter, and instrumentation applications up to 800G, with flexible timing channel management and sync capabilities.
- ONELab, led by Linaro with Renesas joining, enhances Arm-based edge and IoT device interoperability through scalable testing, aiming to streamline certifications and ensure cloud-native readiness.

Samsung

- Samsung is set to release the Galaxy Z Fold6 Slim in China this October, featuring a larger main screen than its predecessor, a lighter and thinner design compared to the standard ZFold6, and an Exynos chipset, but without SPen support due to its thinner build.
- Samsung Electronics unveiled SF2, a new two-nanometer chip manufacturing node with GAA transistor design, set for initial launch in 2025, followed by improved versions SF2P in 2026 and SF2B in 2027, aimed at boosting chip performance and lowering production expenses.
- Samsung Electronics accelerates AI chip production by integrating memory chips, foundry, and packaging services into a streamlined process, reducing production time by about 20%, aiming to meet rising demand for AI technology.
- Samsung Electronics Foundry Division struggles with yield and power efficiency in its 3nm process, losing clients to TSMC; plans to enhance competitiveness with Backside Power Delivery technology in its upcoming 2nm process.

Siemens

- Siemens increases investment in Frankfurt switchgear plant with 100 million euros, expanding facilities to support sustainable energy solutions, including SF6-free technology, creating 400 new jobs by 2027, and emphasizing digital transformation and environmental sustainability.
- Foxconn and Siemens have partnered to enhance digital transformation and sustainability at Foxconn's manufacturing facilities, focusing on automation, Siemens factory technology, industrial software, digital twins, and setting standards for future factories and manufacturing processes.
- Arup is leading the design of Siemens Mobility's new £100 million manufacturing and R&D facility in Chippenham, supported by architect AHR, aiming for completion by 2026 with a focus on sustainability and expected to employ 800 staff.
- Siemens Canada is investing \$14 million to modernize its Drummondville manufacturing facility, enhancing efficiency, expanding production of switchboards and panels, and potentially increasing jobs by up to 15% by 2027 to support market demands and digital manufacturing growth in Quebec.

STMicroelectronics

- STMicroelectronics has launched the ST4SIM-300, the industry's first embedded SIM meeting the GSMA standard SGP32 for eSIM IoT deployments, aiming to simplify device management and network switching while enhancing security and connectivity for IoT applications.
- STMicroelectronics receives €2 billion from Italy to build a silicon carbide chip factory in Sicily, advancing EU efforts to boost semiconductor autonomy, focusing on electric vehicles and renewable energy, set to operate fully by 2032.
- STMicroelectronics has launched the TSB952 dual operational amplifier, featuring 52MHz gain-bandwidth, low 3.3mA per channel supply current at 36V, and a wide 4.5V-36V supply voltage range for versatile power-conscious designs in industrial and automotive applications.

Toshiba

- Toshiba Electronic Devices & Storage has completed a new 300mm wafer fab and office in Japan to increase production of power semiconductors like MOSFETs and IGBTs, set for mass production in late fiscal year 2024 to meet rising demand from automotive electrification and industrial automation.
- Toshiba completes new 300mm semiconductor fab in Japan to increase MOSFET and IGBT production by 2.5 times, integrating AI and renewable energy for sustainability, targeting mass production by late 2024.



Texas Instruments

- Texas Instruments' new RFAB2 semiconductor wafer plant in Richardson, Texas, achieves LEED Gold v4 certification, marking TI's fourth globally and the first U.S. semiconductor fab to meet stringent sustainability standards with a focus on water and electricity conservation and healthy workplace design.
- Sherman is preparing for Texas Instruments' \$30 billion manufacturing plant with \$500 million in infrastructure projects, including a \$300 million industrial wastewater facility and an 11-mile pipeline to supply water crucial for chip production. Roads like the \$17 million Shepherd Drive expansion are also being upgraded to support efficient employee access to the facility, set to open in 2025.

TSMC

- Apple, along with TSMC and Murata, expands its Restore Fund with a combined investment of \$280 million to co-fund natural carbon neutralization projects, aiming for high-quality carbon removal and ecosystem protection as part of Apple's 2030 carbon neutrality goal.
- Construction of TSMC's new chip packaging facility in Chiayi County, Taiwan, has been paused due to the discovery of archaeological ruins, delaying its 2028 mass production start, as TSMC navigates preservation planning amidst rising demand for CoWoS packaging from Nvidia and AMD.
- Due to overwhelming demand from tech giants like NVIDIA, Apple, AMD, and Qualcomm, TSMC's 3nm chip supply is reserved until 2026, prompting considerations for price hikes on AI hardware, despite TSMC's efforts to expand production to 180,000 wafers per month and maintain strategic partnerships.

Vishay

- Vishay Intertechnology is expanding Critical Manufacturing's MES software to its semiconductor business, starting at the Voecklabruck plant in Austria, aiming to enhance operational efficiency and standardization across its global network of facilities.
- Vishay Intertechnology has acquired Ametherm, Inc. for \$31.5 million in cash, enhancing its product portfolio with inrush current limiters and sensing thermistors critical for automotive, industrial, aerospace, defense, and medical markets.





ANALOG		PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)
Standard	Amplifiers & Comparators	→	→	18+
	Analog Interface	→	→	18+
	Power Management	→	→	18+
	Converters	→	→	18+
Standard Analog Total		→	→	18+
Advanced		→	→	18+

MOS MICROLOGIC		PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)
MPU		→	→	18+
MCU	8 Bit & Lower	→	→	12-18
	16 Bit	→	→	18+
	32 Bit & Higher	→	→	12-18
MCU Total		→	→	18+
Automotive MCU		→	→	28+
DSP		→	→	28+

PROGRAMMABLE LOGIC	PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)
	→	→	18+

STANDARD LOGIC	PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)
Timing Products	→	→	28+
Interface	→	→	28+
Connectivity	→	→	28+
Standard Logic	→	→	12-18

POWER	PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)
FET	→	→	18+
IGBT	→	→	28+
Rectifier	→	↑	12-18
Other Power	→	↑	12-18



MEMORY		PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)
Flash	NOR	↑	→	18+
	NAND	→	→	12-18
eMMC		↑	→	12-18
EEPROM		→	→	12-18
DRAM		↑	↑	18+
SRAM		→	→	12-18
Solid State Drives		↑	↑	28+

SENSORS	PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)
	→	→	28+

OPTO	PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)
LEDs (Low Power)	→	→	4-10
LEDs (Mid Power)	→	→	4-10
LEDs (High Power)	→	→	12-18
Couplers	↓	→	18+
Fibre-Optic	↓	→	18+
Infrared	↓	→	18+
Other Opto	↓	→	18+

DISCRETE	PRICING TREND	LEAD TIME TREND	LEAD TIME (WEEKS)
Small Signal	↓	→	12-18
RF	→	→	12-18



↔	Stable
↗	Increasing
↘	Decreasing
SMA	Selective Market Adjustment
EOL	End-of-Life

Click on a category below:

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- [Electromechanical](#)
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Analog

MANUFACTURER	PRODUCT	LEAD TIME (WEEKS)	TREND	PRICING	COMMENTS
Analog devices	Sensors	18-22	↔	↗	
ams	Sensors	10-26	↔	SMA	
Bosch Sensortec	Sensors	8-14	↔	↔	
Diodes Incorporated	Multi- Source Analog/Power	12-22	↔	↔	
	Switching Regulators	14-26	↔	↔	
FTDI Chip	Interface	16-22	↘	↔	
Infineon	Sensors	6-28	↔	↔	
	Switching Regulators	16-32	↔	↔	
	Analog and Power for Automotive (CAN/LIN/Smart FET)	30-44	↘	↔	
MaxLinear	Interface	10-14	↘	↔	
Melexis	Sensors	14-62	↔	SMA	
Microchip	Signal Chain (Amplifiers and Data Converters)	6-12	↘	↔	
	Timing	10-14	↘	↔	
	Switching Regulators	10-22	↔	↔	
Monolithic Power Systems	Switching Regulators	14-26	↔	↔	
NXP	Sensors	18-54	↔	↔	
	Interface	18-22	↘	↔	
	Analog and Power for Automotive (CAN/LIN/Smart FET)	18-28	↘	↔	



MANUFACTURER	PRODUCT	LEAD TIME (WEEKS)	TREND	PRICING	COMMENTS
Onsemi	Sensors	20-54	↔	SMA	
	Signal Chain (Amplifiers and Data Converters)	12-22	↙	↔	
	Timing	26-32	↔	↔	
	Multi- Source Analog/Power	12-30	↙	↔	
	Switching Regulators	12-28	↔	↔	
Panasonic	Sensors	18-28	↗	↔	
Pericom Saronix-eCera	Timing	18-28	↗	↔	
Power Integrations	Switching Regulators	18-20	↔	↔	
Renesas	Signal Chain (Amplifiers and Data Converters)	18-26	↙	↔	
	Timing	36-38	↔	↔	
	Interface	22-32	↔	↔	
	Switching Regulators	14-28	↔	↔	
ROHM	Sensors	26-54	↗	↗	
	Switching Regulators	14-28	↔	↔	
ST Microelectronics	Sensors	22-36	↔	↔	
	Signal Chain (Amplifiers and Data Converters)	12-22	↙	↔	
	Multi- Source Analog/Power	12-22	↙	↔	
	Switching Regulators	12-22	↔	↔	
	Analog and Power for Automotive (CAN/LIN/Smart FET)	26-40	↙	↔	
TE Sensor Solutions	Sensors	18-54	↗	SMA	
	Regulators	18-22	↔	↔	
Texas Instruments	Sensors	18-22	↔	↔	
	Interface	18-22	↔	↔	
Vishay	Sensors	26-54	↗	↔	



Batteries

MANUFACTURER	PRODUCT	LEAD TIME (WEEKS)	TREND	PRICING	COMMENTS
Alium Batteries	Lithium Ion	22-24	↔	↔	
	Alkaline	12-14	↔	↔	
Energizer	Lithium Metal	16-18	↔	↔	
	Silver Oxide	10-12	↔	↔	
GP Batteries	Alkaline	16-18	↔	↗	
	Lithium Metal	20-22	↔	↗	
	Lithium Ion	18-20	↔	↗	
	Nickle Metal Hydride	12-14	↔	↔	
	Lead Acid	10-12	↔	↔	
	Carbon Zinc	10-12	↔	↔	
Panasonic	Alkaline	12-14	↔	↔	
	Lithium Metal	16-18	↘	↔	
	Nickle Metal Hydride	10-12	↔	↔	
	Carbon Zinc	10-12	↔	↔	
Rayovac	Alkaline	10-12	↔	↔	
	Lithium Metal	12-14	↔	↔	
	Nickle Metal Hydride	10-12	↔	↗	
	Carbon Zinc	10-12	↔	↔	
Renata Batteries	Lithium Metal	16-18	↔	↔	
	Lithium Ion	22-24	↔	↔	
	Nickle Metal Hydride	12-14	↔	↗	
	Silver Oxide	10-12	↔	↔	
	Carbon Zinc	10-12	↔	↔	



Batteries

MANUFACTURER	PRODUCT	LEAD TIME (WEEKS)	TREND	PRICING	COMMENTS
Tadiran Batteries	Lithium Metal	14-16	↔	↔	
	Alkaline	12-14	↔	↔	
VARTA	Lithium Metal	20-26	↔	↔	
	Lithium Ion	34-40	↔	↔	
	Nickle Metal Hydride	12-14	↔	↗	





Connectivity

MANUFACTURER	PRODUCT	LEAD TIME (WEEKS)	TREND	PRICING	COMMENTS
AMS	RFID	22	↗	↔	
CEL	802.15.4/Zigbee Modules	28-34	↔	↔	
	Small Signal, Schottky Diodes, PIN Diodes, Bipolar Transistors, FETs/PHEMTs, Amplifiers, Mixers & Modulators, VCOs, SS Bipolar Transistors, Wideband Transistors	32	↔	↔	
Infineon + Cypress	Bluetooth Modules	18-26	↔	↔	
	Small Signal, Schottky Diodes, PIN Diodes, Bipolar Transistors, FETs/PHEMTs, Amplifiers, Mixers and Modulators, VCOs, SS Bipolar Transistors, Wideband Transistors	14-18	↔	↔	Cypress is now Infineon
Fibocom	Cellular Modules	18-22	↔	↔	
Kyocera AVX	Antennas	10-12	↔	↔	
Laird Connectivity	Wi-Fi Modules	18-38	↔	↔	
	Antennas	14-18	↗	↔	
Linx Technologies	LoRa	~32-54	↗	↔	
	Cellular Modules	8-12	↔	↔	
Melexis	Antennas	12-14	↗	↔	
	Transceivers/Receivers	12-14	↗	↔	
Microchip	Transceivers/Receivers	18	↔	↔	
	RFID	16-18	↔	↔	
MultiTech	Wi-Fi Modules	14 -22	↔	↔	
	Bluetooth Modules	14-22	↔	↔	
	Transceivers/Receivers	14-22	↔	↔	
MultiTech	LoRa	18	↔	↔	
	Cellular Modules	18-22	↔	↔	
	LoRa	~22	↔	↔	



MANUFACTURER	PRODUCT	LEADTIME (WKS)	TREND	PRICING	COMMENTS
Murata	Wi-Fi Modules	28-52	↔	↔	
	Bluetooth Modules	28-52	↔	↔	
	Small Signal, Schottky Diodes, PIN Diodes, Bipolar Transistors, FETs/PHEMTs, Amplifiers, Mixers and Modulators, VCOs, SS Bipolar Transistors, Wideband Transistors	14-22	↔	↔	
	LoRa	32-42	↔	↔	
Nearson	Antennas	10-12	↔	↔	
NXP	Multi-Protocol/Chip Solutions	28-38	↔	↗	
	Transceivers/Receivers	26	↔	↔	Parts on allocation
	RFID	16	↔	↔	
	High Power IC's	14-18	↔	↔	
Small Signal, Schottky Diodes, PIN Diodes, Bipolar Transistors, FETs/PHEMTs, Amplifiers, Mixers and Modulators, VCOs SS Bipolar Transistors, Wideband Transistors	14-18	↔	↔		
Onsemi	Bluetooth Modules	18-32	↔	↔	
Panasonic	Bluetooth Modules	18-28	↔	↔	
	RFID	16-18	↔	↔	
Pulse Electronics	Antennas	10-12	↔	↔	
Semtech	Transceivers/Receivers	12-14	↗	↔	
	LoRa	10-18	↔	↔	
Sierra Wireless	Multi-Protocol/Chip Solutions	42-48	↔	↔	Intel based radios are at 52 weeks
	Cellular Modules	10-12	↔	↔	
Silex Technology	Wi-Fi Modules	22-42	↔	↔	
STMicroelectronics	Bluetooth Modules	12-14	↔	↔	Capacity constraints on Spirit Radio ST25R39xx on allocation
	Transceivers/Receivers	14	↔	↔	
	RFID	22	↔	↔	
	GPS	14	↔	↔	
	High Power IC's	22-32	↔	↔	
	LoRa	12-14	↔	↔	



MANUFACTURER	PRODUCT	LEADTIME (WKS)	TREND	PRICING	COMMENTS
Synapse Wireless	802.15.4/Zigbee Modules	20-22	↔	↔	
Taoglas	Antennas	22-24	↗	↔	
TDK	Small Signal, Schottky Diodes, PIN Diodes, Bipolar Transistors, FETs/PHEMTs, Amplifiers, Mixers and Modulators, VCOs, SS Bipolar Transistors, Wideband Transistors	14-22	↔	↔	
Thales	Cellular Modules	14-22	↔	↔	
	Bluetooth Modules	14-28	↔	↔	
U-Blox	Cellular Modules	14-28	↔	↔	Parts are on allocation, lead time is 26+
	GPS	14-28	↔	↔	Parts are on allocation and increasing in cost
	WiFi Modules	14-28	↔	↔	

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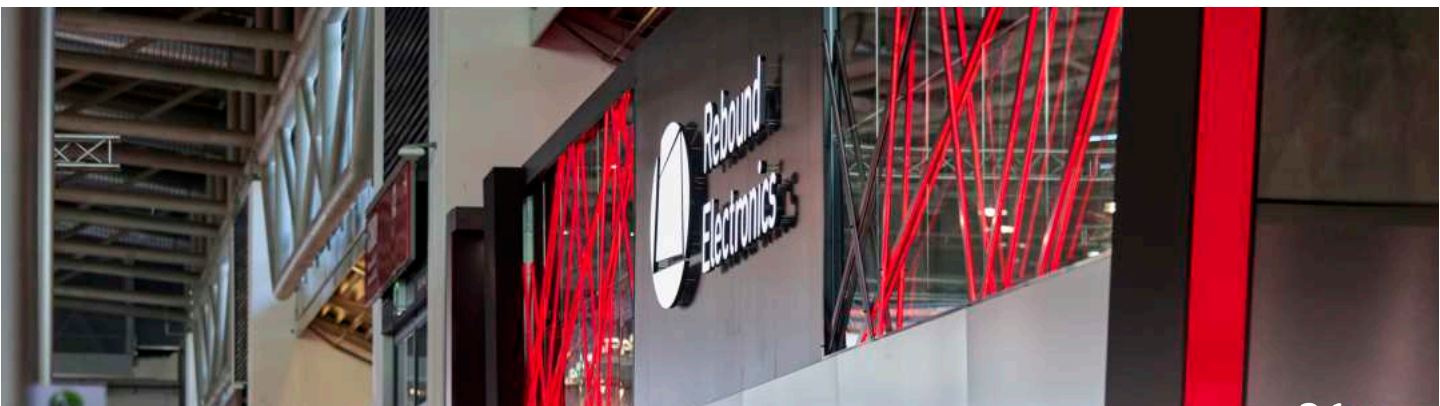


Preventing problems in your supply chain.



Discrete

MANUFACTURER	PRODUCT	LEAD TIME (WKS)	TREND	PRICING	COMMENTS
Diodes Inc.	Low Voltage MOSFETS	10-18	✓	SMA	
	TVSDiodes	8-14	✓	↔	
	Bridge Rectifiers	10-18	↔	↔	
	Schottky Diodes	10-14	↔	↔	
	Rectifiers	10-16	↔	↔	
	Switching Diodes	10-14	↔	↔	
	Small Signal MOSFETS	10-14	↔	↔	
	Zener Diodes	10-14	↔	↔	
	Bipolar Transistors	10-14	↔	↔	
	Digital Transistors	10-14	↔	↔	
	General Purpose Transistors	10-14	↔	↔	
	Logic	10-12	↔	↔	
EATON	ESD	12-14	↔	↔	
	Fuses	10-14	↔	↔	
	Caps and Holders	12-16	↔	↔	
Everlight	Optocoupler Components	16-20	✓	↔	
	Rectifiers	18-52	✓	SMA	
	Optocoupler Components	18-22	↔	↔	
Infineon	Low Voltage MOSFETS	12-22	✓	SMA	
	High Voltage MOSFETS	12-22	✓	↔	
	IGBTs	14-44	✓	↔	
	Wide Bandgap Mosfets	16-38	↔	↔	
	Digital Transistors	8-32	↔	↔	
	General Purpose Transistors	8-32	↔	↔	
Texas Instruments	Mil-Aero Transistors	22-32	↔	↔	
	Logic	18-22	↔	↔	





MANUFACTURER	PRODUCT	LEAD TIME (WKS)	TREND	PRICING	COMMENTS
Isocom Components	Optocoupler Components	4-6	↔	↔	
IXYS	High Voltage MOSFETS	52-56	↔	↔	
	IGBTs	52-56	↔	↔	
Keystone	Clips and Holders	12-18	↔	SMA	
Kyocera	Varistors	16-20	↔	↔	
Lite-On	Optocoupler Components	14-16	↔	↔	
Littelfuse	ESD	42-62	↔	↔	
	Diode Arrays	42-62	↔	↔	
	Varistors	12-14	↔	↔	
	Wide Bandgap Mosfets	12-14	↔	↔	
	Fuses	10-14	↔	↔	
	PTC Fuses	10-14	↔	↔	
	Clips and Holders	12-16	↔	↔	
	Thyristors/Triacs	18-22	↔	↔	
	TVSDiodes	8-14	✓	↔	
	Sensors	18-32	↔	SMA	
Micro Commercial Components	Low Voltage MOSFETS	12-22	✓	↔	
	High Voltage MOSFETS	16-30	↔	↔	
	ESD	12-14	↔	↔	
	TVSDiodes	8-10	↔	↔	
Micro Commercial Components	Schottky Diodes	10-16	↔	↔	
	Switching Diodes	12-16	↔	↔	
	Small Signal Mosfets	12-16	↔	↔	
	Zener Diodes	12-16	↔	↔	
	Bipolar Transistors	10-16	↔	↔	
	General Purpose Transistors	10-16	↔	↔	



MANUFACTURER	PRODUCT	LEAD TIME (WKS)	TREND	PRICING	COMMENTS
Microchip	High Voltage Mosfets	10-52	✓	↔	
	Wide BandGap Mosfets	14-38	↔	↔	
Microsemi	High Voltage MOSFETS	44-54	↔	↔	
	IGBTs	44-54	↔	↔	
	Mil-Aero Diodes	28-54	↔	↔	
	Mil-Aero Transistors	34-62	↔	↔	
Nexperia	Low Voltage MOSFETS	8-18	✓	SMA	
	ESD	8-12	↔	↔	
	Schottky Diodes	6-10	↔	↔	
	Switching Diodes	6-10	↔	↔	
	Small Signal MOSFETS	8-10	↔	↔	
	Zener Diodes	6-10	✓	↔	
	Bipolar Transistors	6-10	↔	↔	
	Digital Transistors	6-10	↔	↔	
	General Purpose Transistors	6-10	↔	↔	
	Logic	8-12	↔	↔	
ON Semiconductor	Low Voltage MOSFETS	14-42	✓	SMA	
	High Voltage MOSFETS	14-42	✓	↔	
	ESD	14-22	✓	↔	
	Wide Bandgap Mosfets	12-32	↔	↔	
	Schottky Diodes	12-42	✓	↔	
	Rectifiers	18-52	✓	SMA	
	Switching Diodes	12-42	✓	SMA	
	Small Signal MOSFETS	14-48	✓	SMA	
	Zener Diodes	12-48	↔	SMA	
	Bipolar Transistors	12-42	✓	SMA	
	Digital Transistors	12-42	✓	SMA	
General Purpose Transistors	12-42	↔	SMA		
Logic	10-20	✓	↔		
ProTek Devices	Diode Arrays	10-14	↔	↔	
Renesas	Optocoupler Components	20-22	↔	SMA	
	High Voltage MOSFETS	18-24	✓	↔	
	Wide Bandgap Mosfets	22-30	↔	↔	
ROHM	Schottky Diodes	14-22	↔	↔	
	Switching Diodes	14-22	↔	↔	
	Digital Transistors	14-18	↔	↔	
	General Purpose Transistors	14-18	↔	↔	



MANUFACTURER	PRODUCT	LEAD TIME (WKS)	TREND	PRICING	COMMENTS
Schurter	Fuses	22-42	↔	↗	
	Clips and Holders	22-32	↗	↗	
Semtech	Diode Arrays	10-14	↔	↔	
ST Microelectronics	Low Voltage MOSFETS	15-43	↙	↔	
	High Voltage MOSFETS	16-42	↙	↔	
	IGBTs	16-54	↙	↔	
	ESD	35-54	↙	↔	
	Wide Bandgap Mosfets	35-54	↔	↔	
	Thyristors/Triacs	18-20	↔	↔	
	TVS Diodes	18-20	↔	↔	
TDK/KEPCOS	Rectifiers	16-18	↔	SMA	
	Bipolar Transistors	14-26	↔	↔	
	Varistors	16-28	↔	↔	
TEConnectivity	PTCFuses	10-14	↔	↔	
Vishay	Low Voltage MOSFETS	8-40	↙	↔	
	High Voltage MOSFETS	12-40	↙	↔	
	TVS Diodes	10-16	↙	↔	
	Bridge Rectifiers	10-12	↔	SMA	
	Rectifiers	10-12	↔	SMA	
	Zener Diodes	12-16	↔	↔	
	Optocoupler Components	6-14	↙	↔	

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INDUSTRIES

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Automotive



Aerospace & Defence



Renewable Energy



Medical





Electromechanical

MANUFACTURER	PRODUCT	LEADTIME (WKS)	TREND	PRICING	COMMENTS
Abracon	Timing	14-54+	↙	SMA	Tuning Fortks-32.7668KHZ and 40-52+ weeks, TCXOs are on allocation due to AKM fire
ADDA	Fans	22-26	↔	↔	
Alps Electric	Switches	26-34	↔	↔	
American Zettler	Relays	18-32	↔	↔	
Bivar	Hardware	12-18	↔	↔	
Boyd	Fans	14-16	↗	↗	
	Heatsinks	18-26	↔	↗	
C&K	Switches	14-54	↔	↔	
Churod Electronics	Relays	10-32	↔	↔	
Citizen Finedevice	Timing	14-54	↔	↔	Tuning Fortks-32.7668KHZ and 40-52+ weeks, TCXOs are on allocation due to AKM fire
COSEL	Power Supplies (AC/DC)	14-38	↙	↔	
	Power Supplies (DC/DC)	14-38	↔	↔	
CTS	Switches	10-12	↔	↔	
	Timing	12-32	↔	↔	Tuning Fortks-32.7668KHZ and 40-52+ weeks, TCXOs are on allocation due to AKM fire
CUI Inc	Power Supplies (AC/DC)	26-54+	↔	↔	
	Power Supplies (DC/DC)	14-38	↙	↔	
	Heatsinks	12-14	↔	↔	
Delta	Fans	42-54	↙	↗	
Diodes Inc	Timing	10-14	↔	↔	Tuning Fortks-32.7668KHZ and 40-52+ weeks, TCXOs are on allocation due to AKM fire



MANUFACTURER	PRODUCT	LEAD TIME (WKS)	TREND	PRICING	COMMENTS
E-Switch	Switches	14-16	↔	↔	
ECS Inc.	Timing	14-42	✓	SMA	Tuning Fortks-32.7668KHZ and 40-52+ weeks, TCXOs are on allocation due to AKM fire
EPSON Electronics America	Timing	14-28	↔	↔	Tuning Fortks-32.7668KHZ and 40-52+ weeks, TCXOs are on allocation due to AKM fire
Essentra Components	Hardware	14-16	↗	↗	
Fox	Timing	12-42+	↔	↔	Tuning Fortks-32.7668KHZ and 40-52+ weeks, TCXOs are on allocation due to AKM fire
Grayhill	Switches	14-26	↔	↗	
Heyco	Hardware	12-14	↔	↔	
Hongfa	Relays	18-32	↔	SMA	
Infineon	Relays	42-54	↔	↗	
IXYS	Relays	12-32	↔	↔	
Keystone	Hardware	14-16	↔	↔	
Kyocera International	Timing	18-30	✓	↔	Tuning Fortks-32.7668KHZ and 40-52+ weeks, TCXOs are on allocation due to AKM fire
MEAN WELL	Power Supplies (AC/DC)	16-20	↔	↔	
Microchip	Timing	14-28	↔	↗	Tuning Fortks-32.7668KHZ and 40-52+ weeks, TCXOs are on allocation due to AKM fire
Murata	Timing	10-12	↔	↔	Tuning Fortks-32.7668KHZ and 40-52+ weeks, TCXOs are on allocation due to AKM fire
Murata Power Solutions	Power Supplies (AC/DC)	10-12	↔	↗	

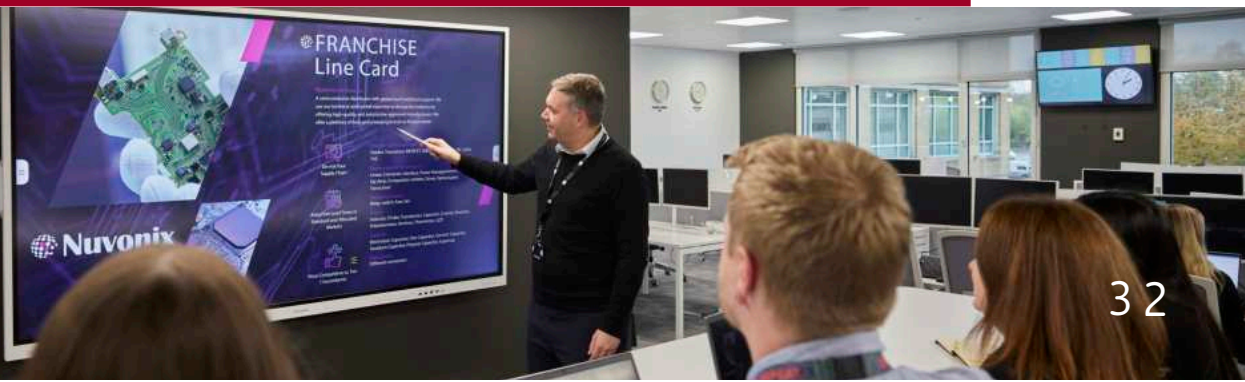




MANUFACTURER	PRODUCT	LEAD TIME (WKS)	TREND	PRICING	COMMENTS
NKK Switches	Switches	12-20	↔	↔	
NMB	Fans	28-42	↔	↔	
Ohmite	Fans	12-14	↗	↗	
Orion Fans	Fans	18-20	↔	↔	
Panasonic	Relays	16-32	↔	↔	
	Switches	12-14	↔	↔	
Qualtek	Fans	22-26	↔	↔	
Raltron	Timing	12-42	↔	↔	Tuning Fortks-32.7668KHZ and 40-52+ weeks, TCXOs are on allocation due to AKM fire
RECOM	Power Supplies (AC/DC)	18-42	↔	↔	
	Power Supplies (DC/DC)	16-38	↔	↔	
Rosenberg	Fans	20-22	↔	↔	
Schneider Electric	Relays	18-20	↔	↔	
Song Chuan	Relays	26-38	↔	↔	
SUNON	Fans	32-44	↔	↔	
TE Connectivity Sensors	Relays	14-16	↔	↔	All stable except the IM ready Series- allocation 52+ weeks
	Switches	12-14	↔	↔	
Vicor	Power Supplies (AC/DC)	28-54	↗	↗	
	Power Supplies (DC/DC)	28-54	↗	↗	
Wakefield Thermal	Heatsinks	12-14	↔	↗	
Wall Industries	Power Supplies (AC/DC)	10-12	↔	↔	
	Power Supplies (DC/DC)	10-12	↔	↔	
ZF Electronics	Switches	20-22	↔	↗	

REBOUND ELECTRONICS

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High - End

MANUFACTURER	PRODUCT	LEAD TIME (WKS)	TREND	PRICING	COMMENTS
AZDisplays	LCD's	14-16	↗	↔	
Compulab	SOM	18-26	↗	↗	
Cypress	8 bit MCU	12-18	↗	↔	
	32 bit MCU	12-54	↗	↔	
	USB	44-54	↗	↔	
Formerica	Automotive	34-48	↔	↔	
	Fibre Optic Transceivers	14-18	↗	↔	
Infineon	Automotive	Allocation	↔	↔	
iWave Systems	SOM	28-32	↔	↔	
Lattice Semiconductor	FPGA	18-26	↗	↗	
Microchip	8 bit MCU	6-14	↔	↔	
	32 bit MCU	6-20	↔	↔	
	PHY/ Ethernet	8-14	↔	↔	
	USB	6-12	↔	↔	
	32 bit MPU	6-22	↔	↔	
Microsemi	FPGA	10-32	↔	↔	
NXP	8 bit MCU	15-42	↗	↔	
	32 bit MCU	15-42	↗	↔	
	Automotive	20-54	↗	↔	
	32 bit MPU	20-42	↗	↔	
	Network Processors	20-44	↗	↔	
Renesas RA	32 bit MCU	20	↗	↔	
Renesas	8 bit MCU	14	↗	↔	
	32 bit MCU	14	↗	↔	
	Automotive	48	↔	↔	
	32 bit MPU	14	↗	↔	
Sharp	LCDs	30-32	↗	↔	
STMicroelectronics	8 bit MCU	12-26	↗	↔	
	Automotive	42-54	↔	↔	
	32 bit MPU	18-22	↗	↔	
	STM32F0- 32 bit MCU	12-14	↗	↔	
	STM32F1- 32 bit MCU	18-22	↗	↔	
	STM32L- 32 bit MCU	18-22	↗	↔	
	Balance 32 bit MCU	12-14	↗	↔	
STM32F2/F4/F7/H7	12-22	↗	↔		
Texas Instruments	MCUs & Processors	30-32	↔	↔	
Xilinx	FPGA	18-22	↔	↔	
Zilog	8 bit MCU	26-42	↔	↔	



Interconnect

MANUFACTURER	PRODUCT	LEADTIME (WKS)	TREND	PRICING	COMMENTS
Adam Tech	I/O Connectors	18-20	↔	↔	
	PCB Connectors	18-20	↔	↔	
Altech Corp.	Terminal Blocks & Crimps	14	↔	↔	
	D-Sub Connectors	10-12	↔	↔	
Amphenol Communications Solutions	Data & Telecom	10-12	↔	↔	
	PCB Connectors	10-12	↔	↔	
	FFC/FPC	10-12	↔	↔	
Amphenol Sine System	Circular Connectors	10-22	↔	↗	
	Data & Telecom	22	↔	↔	
ASSMAN WSW Components	PCB Connectors	22	↔	↔	
	IC Sockets	22	↔	↔	
Bulgin	Circular Connectors	18-20	↔	↗	
EDAC	PCB Connectors	16-24	↔	↔	
Global Connector Technology	PCB Connectors	10-12	↔	↔	
	FFC/FPC	10-12	↔	↔	



MANUFACTURER	PRODUCT	LEAD TIME (WKS)	TREND	PRICING	COMMENTS
HALO Electronics	Data & Telecom	14-20	↔	↔	
HARTING	PCB Connectors	12-14	↔	↔	
	PCB Connectors	10-18	↗	↔	
Hirose Electric	RF Connectors	10-18	↗	↔	
	FFC/FPC	10-18	↗	↔	
JST	PCB Connectors	18	↔	↔	
Mil-Max	PCB Connectors	6-8	↔	↔	
	IC Sockets	6-8	↔	↗	
Oupiin	PCB Connectors	16-22	↔	↔	
Sullins	PCB Connectors	8-10	↔	↔	
TE Connectivity	Automotive Connectors	14-18	↔	↔	
	Circular Connectors	14-18	↔	↔	
	Relays	14-18	↔	↔	
	Data & Telecom	14-18	↔	↔	
	PCB Connectors	14-18	↔	↔	
	RF Connectors	14-18	↔	↔	
	IC Sockets	14-18	↔	↔	
	Terminal Blocks & Crimps	14-18	↔	↔	
	Lighting Connectors	14-18	↔	↔	
WAGO	Terminal Blocks & Crimps	16	↔	↔	
	Lighting Connectors	16	↔	↔	
WECCO	Terminal Blocks & Crimps	22	↔	↗	



Lighting Solutions & Opto

MANUFACTURER	PRODUCT	LEAD TIME (WKS)	TREND	PRICING	COMMENTS
Bridgelux	Chip On Board (CoB)	8-10	↔	↔	
Dialight	Indication LEDs	12-18	↔	↗	
	6V (LED Optics)	12-18	↔	↔	
Everlight	Automotive LEDs (AEC-Q101 Certified)	10-12	↔	↔	
	Infrared Components/ LED	16-18	↔	↔	
	Indication LEDs	16-18	↔	↔	
Excellence Optoelectronics Inc.	UV LEDs	10-12	↔	↔	
	Automotive LEDs (AEC-Q101 Certified)	10-12	↔	↔	
	Standard Light Engines (Level 2 Boards)	16-18	↔	↔	
General Luminaire	Standard Light Engines (Level 2 Boards)	16-18	↔	↔	
Inolux	Indication LEDs	8-10	↔	↔	
Kingbright	LED Displays	12-14	↔	↔	
	Indication LEDs	10-12	↔	SMA	
Lite-On	Infrared Components/ LED	16-18	↔	↔	
	LED Displays	16-18	↔	↔	
	Indication LEDs	18-22	↔	↔	
Lumex	LED Displays	18	↔	↔	
	Indication LEDs	10-16	↔	↔	
Lumileds	Illumination High Power LEDs (White)	10-16	↔	↔	
	Illumination High Power LEDs (Colors)	10-16	↔	↔	
	Illumination High Power LEDs (White & Colors)	10-12	↔	↔	
	Horticultural Mid Power LEDs (White & Colors)	10-12	↔	↔	
	Automotive LEDs (AEC-Q101 Certified)	16-18	↔	↔	
	Chip On Board (CoB)	10-12	↔	↔	
	Standard Light Engines (Level 2 Boards)	20-28	↔	↔	
Meanwell	Infrared Components/ LED	28	↔	↔	
	UV LEDs	14-18	↔	↔	
	LED Drivers	12-22	↔	↔	
Murata	Lighting Controls	28-32	↔	↔	



MANUFACTURER	PRODUCT	LEAD TIME (WKS)	TREND	PRICING	COMMENTS
Nichia	Illumination High Power LEDs (White)	8-12	↔	↔	
	Illumination High Power LEDs (Colors)	8-12	↔	↔	
	Illumination High Power LEDs (White & Colors)	10-12	↔	↔	
	Horticultural Mid Power LEDs (White & Colors)	10-12	↔	↔	
	Chip On Board (CoB)	14-16	↔	↔	
ROHM	Infrared Components/ LED	8-10	↔	↔	
	Indication LEDs	12-14	↔	↔	
Samsung LED	Illumination High Power LEDs (White)	8-10	↔	↗	
	Illumination High Power LEDs (White & Colors)	10-12	↔	↗	
	Horticultural Mid Power LEDs (White & Colors)	10-12	↔	↗	
	Chip On Board (CoB)	8-10	↔	↗	
	Standard Light Engines (Level 2 Boards)	8-10	↔	↗	
Seoul Semiconductor	Illumination High Power LEDs (White)	8-10	↔	↔	
	Illumination High Power LEDs (White & Colors)	8-10	↔	↔	
	Horticultural Mid Power LEDs (White & Colors)	8-10	↔	SMA	
	Chip On Board (CoB)	10-12	↔	↔	
	Standard Light Engines (Level 2 Boards)	12-14	↔	↔	
Seoul Viosys	UV LEDs	10-12	↔	↔	
Stanley Electric	LED Displays	14	↔	↔	
	Indication LEDs	12-14	↔	↔	
TEConnectivity	6A (Heat Sinks, LED Holders)	22-52	↔	↔	
TT Electronics- Optek Technology	Infrared Components/ LED	28-46	↔	↗	
VCC	Indication LEDs	14	↔	↗	
Vishay	Infrared Components/ LED	10-22	↘	↔	
	Indication LEDs	10-32	↔	↗	
	UV LEDs	16-18	↔	↔	



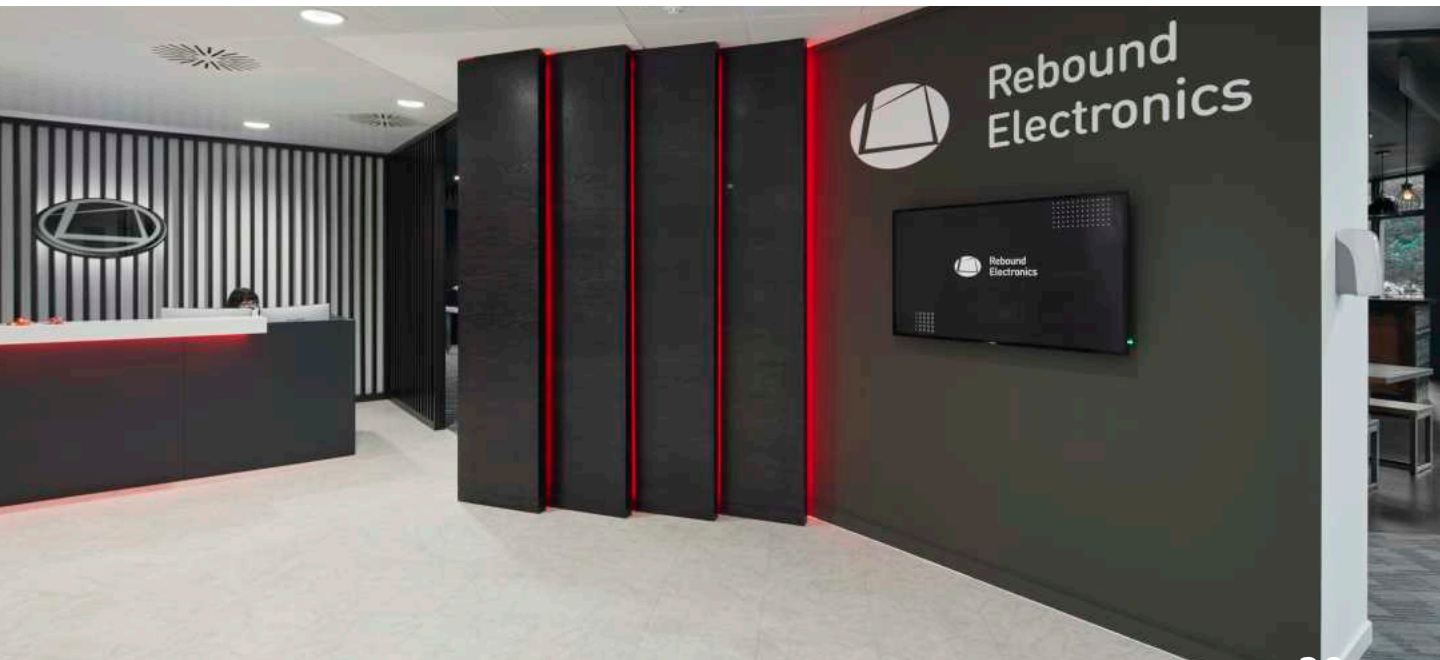


Memory

MANUFACTURER	PRODUCT	LEAD TIME (WKS)	TREND	PRICING	COMMENTS
ADATA	Memory Modules	8-10	↔	↗	
	eMMC	8-10	↗	↗	
	Memory Cards	10-12	↔	↗	
	Solid State Drives (SSD)	10-14	↗	↗	
Alliance Memory	PC (Commodity) DRAM	4-22	↔	↔	
	Mobile RAM	10-18	↗	↔	
	SRAM	10-32	↗	↔	
	NOR Flash	14-22	↔	↔	
	NAND Flash	10-26	↗	↔	
	eMMC	10-14	↔	↔	
Cypress	SRAM	14-54	↗	↔	
	NOR Flash	14-28	↗	↔	
	FRAM & NVSRAM	14-28	↗	↔	
Everspin Technologies	MRAM	14-30	↔	↔	
Greenliant	NOR Flash	10-18	↔	↔	
	eMMC	14-20	↗	↗	
	Memory Cards	10-18	↔	↗	
	Solid State Drives (SSD)	10-18	↗	↗	
Kingston	PC (Commodity) DRAM	4-6	↔	↗	
	Memory Modules	4-8	↔	↗	
	eMMC	6-8	↗	↗	
	Memory Cards	4-12	↔	↗	
	Solid State Drives (SSD)	6-10	↗	↗	
Macronix	NOR Flash	10-14	↔	SMA	
	NAND Flash	10-14	↔	SMA	
	eMMC	20-28	↔	↗	Parts on allocation, MXIC is not quoting and not taking new orders for the time being



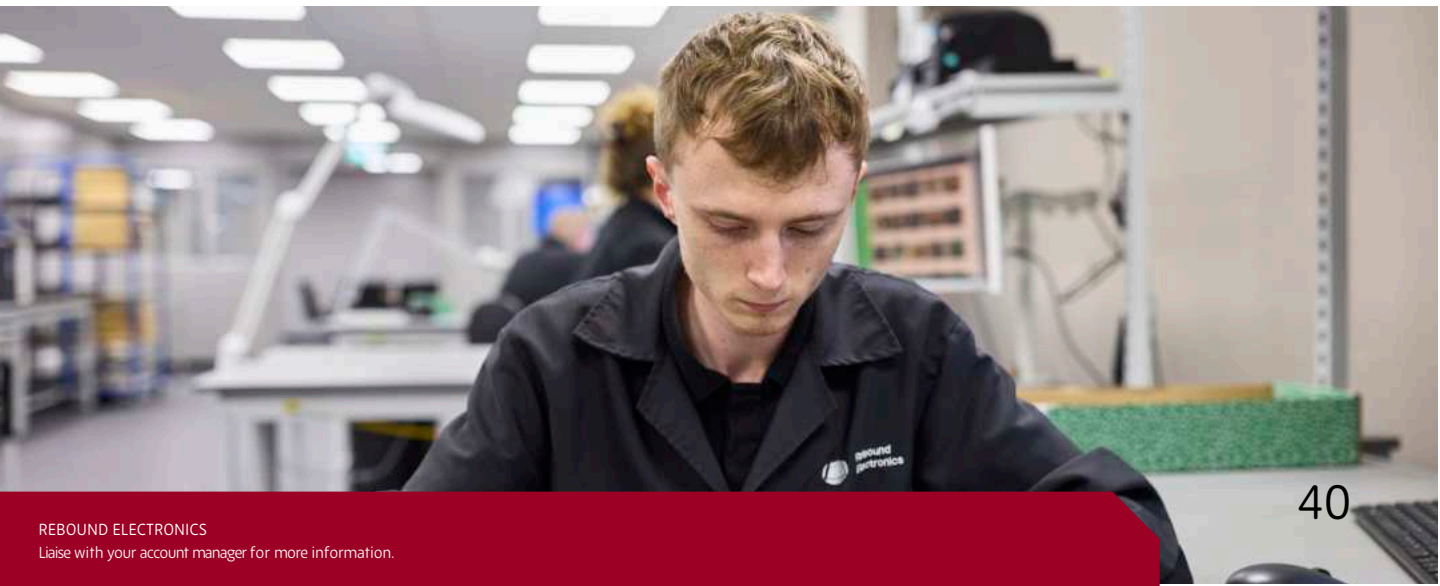
MANUFACTURER	PRODUCT	LEAD TIME (WKS)	TREND	PRICING	COMMENTS
Microchip	SRAM	6-14	✓	↔	
	NORFlash	6-54	✓	↔	
	EEPROM	6-28	✓	↔	
	EPROM	14-28	↔	↗	
Onsemi	SRAM	22-42	↔	↔	
	EEPROM	22-32	↔	↔	
Renesas	SRAM	20-24	✓	↔	
	NOR FLASH	20-24	✓	↔	
	DATA FLASH	30-32	↔	↔	
Samsung LED	PC (Commodity) DRAM	54-56	↔	↔	Parts on allocation, Samsung is not quoting and not taking new orders for the time being
	Memory Modules	54-56	↔	↔	
	eMMC	54-56	↔	↔	
	Solid State Drives (SSD)	54-56	↔	↔	
SkyHigh Memory	SLC NAND Flash	8-12	✓	↔	
	eMMC	10-14	↔	✓	
STMicroelectronics	EEPROM	8-14	↔	↔	Now on allocation





Passives

MANUFACTURER	PRODUCT	LEAD TIME (WKS)	TREND	PRICING	COMMENTS
Api Delevan	Inductors	16-18	↙	↔	
Cornell Dubilier Electronics	Electrolytic	24-48	↔	↗	
	Capacitor	28-42	↙	↗	
CTS	Resistor Networks	18-42	↔	↔	
Eaton	Capacitors - Supercapacitors	12-22	↙	↔	
	Inductors	22-32	↙	↔	
ELNA	Capacitors - Supercapacitors	32-54+	↔	↔	
HALO Electronics	Inductors	16-18	↙	↔	
Murata	Filters	14-18	↔	↔	
	Inductor / Transformers	14-22	↔	↔	
	Surface Mount General Capacitors- Ceramic (Less than 1 uf)	12-16	↔	↔	
	Surface Mount General Capacitors- Ceramic (Greater than 1 uf)	12-14	↔	↔	
	Leaded Capacitors- Ceramic	18-20	↔	↔	
	Specialty Capacitors	18	↔	↔	
	Surface Mount General Capacitors	16-18	↔	↔	
		Electrolytic	24-32	↙	↔
NIC Components	Filters	16-22	↔	↔	
	Inductors	16-22	↔	↔	
	Fixed Resistors	14-20	↔	↔	
		20-22	↔	↔	
	Surface Mount General Capacitors - Ceramic (Greater than 1 uf)	14-16	↔	↔	
	Leaded Capacitors - Ceramic	28-30	↔	↔	





MANUFACTURER	PRODUCT	LEAD TIME (WKS)	TREND	PRICING	COMMENTS
Nichicon	Electrolytic	20-32	↙	↔	
	Electrolytic	20-32	↙	↔	
	Capacitors- Polymer Tantalum	12-14	↔	↔	
Panasonic	Inductors / Transformers	20-24	↔	↔	
	Fixed Resistors	22-32	↙	↔	
	Resistor Networks	20-30	↔	↔	
Paktron Capacitors	Capacitors- Film	14-18	↔	↗	
	Fixed Resistors	46-48	↔	↔	
	Surface Mount General Capacitors- Ceramic (Less than 1 uf)	46-48	↔	↔	
Samsung Electro-Mechanics	Surface Mount General Capacitors – Ceramic (Great than 1 uf)	14-16	↔	↔	
	Surface Mount General Capacitors-Ceramic *Automotive Upgrade	14-16	↔	↔	
Stackpole Electronics	Fixed Resistors	18-26	↔	↔	
Sumida	Inductors	22-26	↔	↔	
	Surface Mount General Capacitors- Ceramic (Less than 1 uf)	20-22	↔	↔	
	Surface Mount General Capacitors- Ceramic (Greater than 1 uf)	22-24	↔	↔	
Taiyo Yuden	Surface Mount General Capacitors-Ceramic *Automotive Upgrade	22-24	↔	↔	
	Filters	14-18	↗	↗	
	Surface Mount General Capacitors- Ceramic (Less than 1 uf)	22-26	↔	↔	
TDK	Surface Mount General Capacitors- Ceramic (Greater than 1 uf)	26-32	↔	↔	
	Surface Mount General Capacitors-Ceramic *Automotive Upgrade	26-32	↔	↔	
	Capacitors- Film	26-54+	↔	↔	
TDK EPCOS	Filters	14-18	↗	↔	
	Inductors / Transformers	18-22	↔	↔	



MANUFACTURER	PRODUCT	LEAD TIME (WKS)	TREND	PRICING	COMMENTS
TT Electronics- BI Technologies	Trimmers & Pots	42-54	↔	↔	
TT Electronics- IRC	Fixed Resistors	22-54	↗	↗	
United Chemi-Con	Electrolytic	24-36	↙	↔	
Viking	Surface Mount General Capacitors- Ceramic (Less than 1 uf)	18-20	↔	↔	
	Surface Mount General Capacitors- Ceramic (Greater than 1 uf)	16-18	↔	↔	
Vishay	Trimmers & Pots	12-22	↔	↔	
	Capacitors- Film	14-22	↙	↔	
	Capacitors- Supercapacitors	14-16	↔	↔	
	Capacitors- Tantalum Molded	18-20	↙	↔	
	Capacitors- Tantalum Conformals	14-16	↔	↔	
	Capacitors- Polymer Tantalum	14-16	↙	↔	
	Inductors / Transformers	14-16	↙	↔	
	Fixed Resistors	12-22	↙	↔	
	Surface Mount General Capacitors - Ceramic (Less than 1 uf)	16-18	↙	↔	
	Leaded Capacitors - Ceramic	20-26	↙	↔	
	Specialty Capacitors	28-36	↙	↔	
WIMA	Capacitors- Film	14-18	↙	↔	
Würth Elektronik	Inductors / Transformers	20-22	↔	↔	
Yageo	Fixed Resistors	20-22	↔	↔	
	Resistor Networks	22-26	↔	↔	
	Surface Mount General Capacitors - Ceramic (Less than 1 uf)	16-18	↔	↔	
	Surface Mount General Capacitors - Ceramic (Greater than 1 uf)	16-18	↔	↔	
	Surface Mount General Capacitors- Ceramic *Automotive Upgrade	16-18	↔	↔	

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Market Insights Q2 2024

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