November 2025

Monthly Market Insights

Rebound Electronics

Market updates

15%

PRICE ADJUSTMENT ACROSS ITS FULL PRODUCT RANGE

Talk of ADI 15% Price Hike Gains Momentum Amid Market Buzz

Market discussions indicate that Analog Devices Inc. (ADI) may implement a 15% price adjustment across its full product range from mid-December, with military-grade lines potentially seeing increases of up to 30%. Formal notifications are expected around mid-November. Industry contacts cite strong industrial and automotive demand alongside tightening channel inventories as key drivers. While some distributors continue to offer selective discounts, others are bracing for cost escalations. If implemented, the adjustment could affect both new and in-transit inventory, prompting strategic stocking and proactive supply planning across the channel.

Procurement Signals Point to Extended Lead Times on Key Infineon Components

Industry sources indicate that Infineon lead times are lengthening significantly, particularly for part numbers beginning with BSS, BSC, IAU, IMW, IMZ, IPG, and BTS, as surging AI-related demand continues to strain power and storage IC capacity. While official vendor data still lists roughly 12-week timelines, distributor analyses via EBV suggest confirmed delivery schedules extending to as much as 40 - 52 weeks for several product lines. Spot checks have revealed discrepancies between published and actual lead times, signaling tightening supply conditions as AI applications increasingly occupy available manufacturing capacity.

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Nexperia Reinforces Its Commitment to Supply-Chain Security and European Manufacturing

Nexperia became the focus of renewed geopolitical attention in October as Dutch authorities increased oversight of the company's operations, citing national-security considerations tied to its Chinese ownership. Reuters reported that these developments have raised concerns among European and U.S. automakers over potential disruptions in automotive semiconductor supply. Despite the pressure, Nexperia emphasized its essential role in Europe's industrial and automotive ecosystem, reaffirming its compliance with all regulatory frameworks. Analysts noted that this episode highlights how even firms specializing in discrete and power semiconductors have become strategically significant within the broader context of technological sovereignty and supply-chain diversification.

Nexperia Updates

Nexperia Under Scrutiny: Europe's Balancing Act Between Security and Industrial Stability

A Defining Moment for Europe's Semiconductor Sector

At Rebound Electronics, we are closely monitoring developments surrounding Nexperia, one of Europe's key semiconductor manufacturers, as the Dutch government intensifies regulatory oversight of its operations. According to Reuters (October 2025), the move was driven by national-security concerns linked to Nexperia's ownership by China's Wingtech Technology. This episode has reignited a critical debate across Europe - how to safeguard technological sovereignty without jeopardising industrial continuity and the security of semiconductor supply chains.

Nexperia's Role and Headquarters

Headquartered in Nijmegen, the Netherlands, Nexperia employs more than 15,000 people worldwide and is a cornerstone of Europe's discrete and power-semiconductor market. The company produces essential components such as diodes, transistors, and MOSFETs that underpin automotive electronics, energy management systems, and industrial automation. As TechRadar (2025) notes, these components - though less high-profile than AI chips - remain indispensable to modern manufacturing and electrification initiatives.

How It Started: Ownership and Oversight

The current regulatory focus stems from Nexperia's 2019 acquisition by Wingtech Technology, which was initially approved under existing European investment rules. However, following heightened global tensions and a shift in Europe's risk-assessment frameworks, regulators began reassessing foreign ownership of strategic technology assets. By mid-2025, Politico Europe (2025) reported that Dutch authorities had begun an internal review of Nexperia's governance structures and data-handling practices, particularly around R&D transparency and export-control compliance.

The Dutch Government's Intervention

In October 2025, the Dutch Ministry of Economic Affairs formally invoked its powers under the National Security Investment Act, imposing restrictions on Nexperia's access to certain intellectual property and research facilities. The government cited "strategic dependency risks" and the potential for technology transfer to non-EU jurisdictions. Nexperia, for its part, maintains full compliance with both Dutch and EU regulations and emphasises that its European operations remain locally controlled.

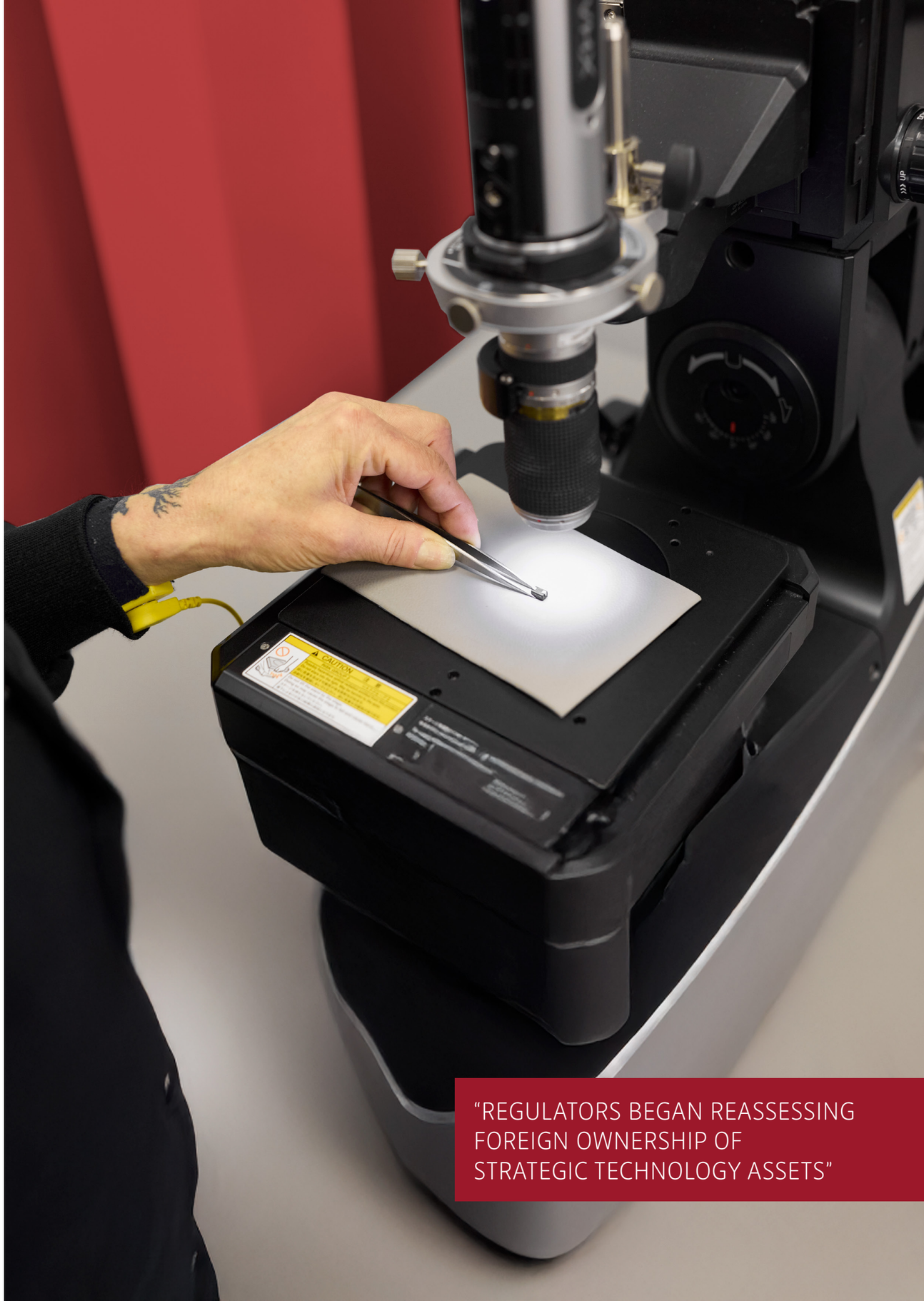
Supply-Chain Effects and Market Implications

While Nexperia's production continues, Bloomberg (2025) reports that European and U.S. automakers remain cautious, fearing potential bottlenecks in discrete and power-semiconductor supply. These components are central to electric-vehicle architecture, motor control, and energy-conversion systems. Even modest administrative delays could trigger cascading effects across Tier-1 suppliers, prompting firms to diversify sourcing strategies or build larger buffer inventories to mitigate risk.

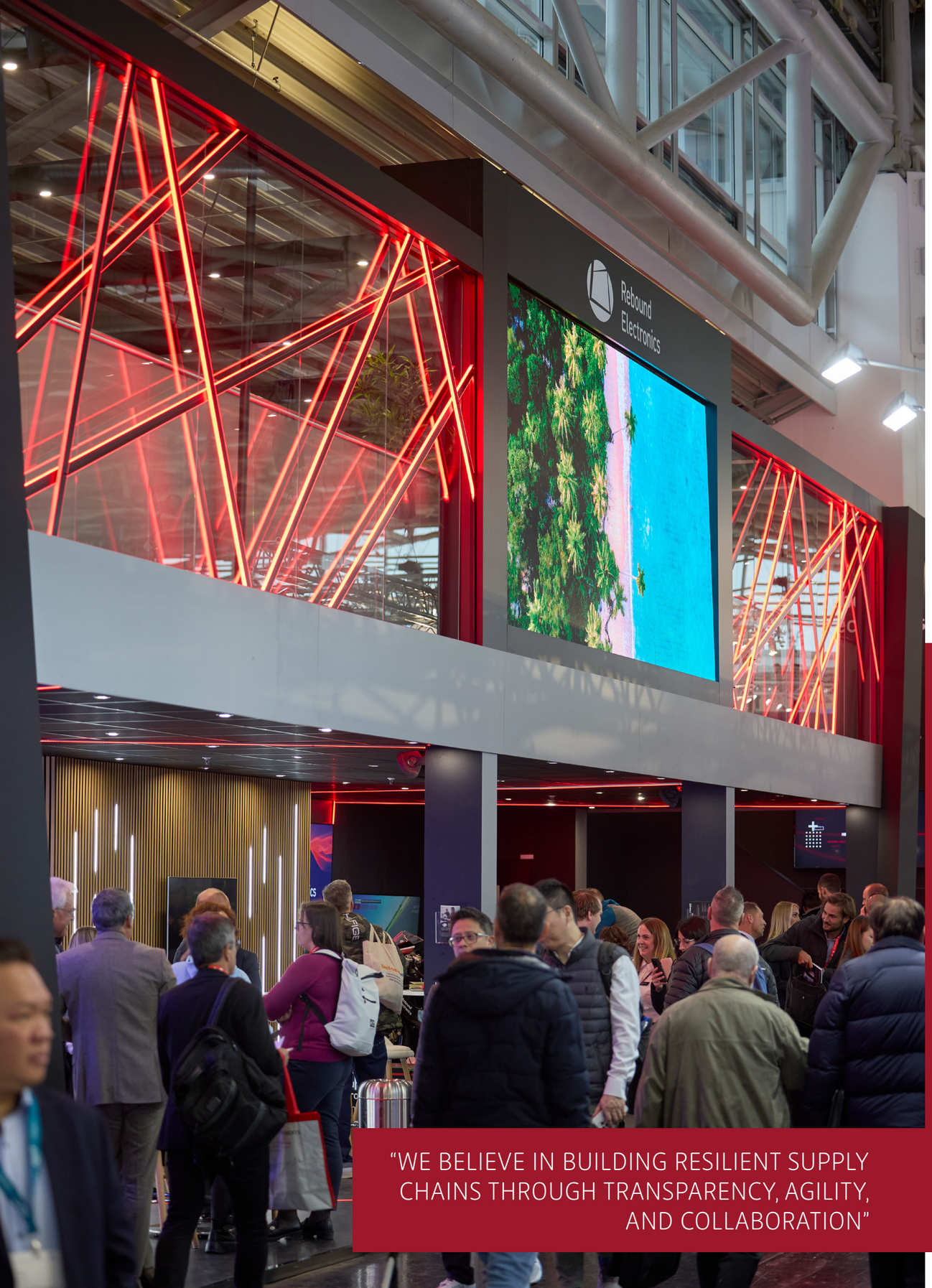
At Rebound Electronics, we have observed increased inquiries from customers seeking qualified alternatives for Nexperia part numbers - especially across power discretes, rectifiers, and logic ICs - as procurement teams work to safeguard continuity.

Analyst Views: Strategic Rebalancing or Over-Regulation?

Industry analysts are split. Semiconductor Digest (2025) describes the Dutch action as "a necessary recalibration" of Europe's technology-security policy. Others argue it could discourage future foreign investment in Europe's semiconductor ecosystem. This case illustrates a broader structural rebalancing - where governments and OEMs are prioritising transparency, traceability, and localisation in the supply chain, even at the expense of short-term efficiency.



"REGULATORS BEGAN REASSESSING FOREIGN OWNERSHIP OF STRATEGIC TECHNOLOGY ASSETS"



Date	Event	Summary
March 2019	Wingtech acquires Nexperia	Full acquisition approved by Dutch authorities.
July 2022	UK orders Nexperia to divest Newport Wafer Fab	First major intervention citing national-security concerns.
Mid-2025	Dutch authorities begin internal review	Governance and ownership structures reassessed.
October 2025	Dutch government imposes oversight measures	New controls under the National Security Investment Act.
Nov–Dec 2025 (expected)	EU coordination on foreign-ownership rules	Anticipated introduction of a unified screening framework.

As of late October 2025, Nexperia remains operational and is actively engaging with the Dutch government to clarify compliance measures. The company has reiterated its commitment to maintaining a stable European supply base and supporting the automotive industry's energy-transition objectives.

Looking ahead, Financial Times (2025) suggests that the EU may establish a unified framework for national-security reviews by the end of the year - potentially creating greater predictability for semiconductor firms operating across multiple jurisdictions.

At Rebound Electronics, we anticipate that the next few months will bring measured stability rather than disruption, as Nexperia adapts to new compliance obligations while its customers re-evaluate sourcing strategies for resilience.

"WE BELIEVE IN BUILDING RESILIENT SUPPLY CHAINS THROUGH TRANSPARENCY, AGILITY, AND COLLABORATION"

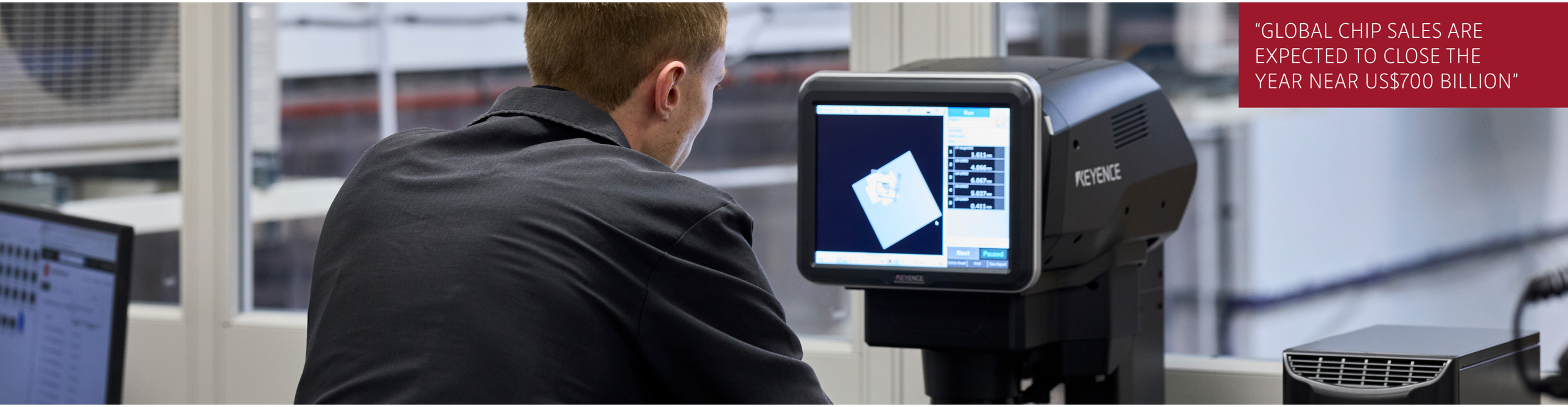
Rebound Electronics: Supporting Supply-Chain Continuity

As supply chains evolve under increased regulatory oversight, Rebound Electronics continues to provide strategic sourcing solutions to help manufacturers maintain production continuity. Our global network and comprehensive line card - including power discretes, MOSFETs, diodes, logic devices, and analogue ICs - enable customers to secure qualified alternatives quickly and confidently.

Through our Nuvonix by Rebound brand, we offer both authorised and traceable sourcing for critical components, alongside risk-obsolescence management (ROM) and BOM-optimisation services. These capabilities empower OEMs and EMS partners to navigate uncertainty, reduce lead-time exposure, and sustain operational agility across a tightening semiconductor landscape.

At Rebound, we believe in building resilient supply chains through transparency, agility, and collaboration - ensuring our customers remain one step ahead, regardless of market volatility.

Market updates



"GLOBAL CHIP SALES ARE EXPECTED TO CLOSE THE YEAR NEAR US$700 BILLION"

AI Boom Powers Semiconductor Surge, But Cycle Risks Loom

The global semiconductor industry entered Q4 2025 on a strong upswing, driven by record AI infrastructure demand, high-bandwidth memory growth, and robust chip equipment orders from firms like TSMC and ASML. According to the Semiconductor Industry Association (SIA), worldwide sales are projected to reach around US $700 billion in 2025, marking double-digit year-on-year growth. Based on recent reports from Reuters and the Wall Street Journal, this surge is being fuelled by strong AI server demand and expanding data-centre investments. Governments are also intensifying reshoring efforts through incentive programs, further boosting capacity expansion. However, analysts warn that the AI-driven boom may peak soon, with potential oversupply and cyclical cooling expected in 2026, even as long-term innovation and regional diversification continue to sustain optimism.

Electronics Sector Accelerates with Smart, Connected Innovation

The global electronics industry is gaining momentum in late 2025, with output projected to grow about 8% year-on-year to nearly US $4 trillion, according to the Japan Electronics and Information Technology Industries Association (JEITA). Based on reports from the HKTDC and AE Digital, growth is being fuelled by strong demand for smart home devices, wearables, automotive electronics, and AI-driven systems. Companies are also capitalizing on expanding 5G infrastructure and energy-efficient technologies that enhance device performance. While firms continue to adapt to evolving trade dynamics and component sourcing, the sector's innovation-driven expansion signals a solid path toward sustained digital and connected growth through 2026.

Typhoons Test Semiconductor Supply Chain Resilience Across Asia

In October 2025, a series of powerful typhoons - notably Matmo and Fengshen - highlighted the semiconductor industry's ongoing vulnerability to climate-related disruption. According to Reuters (2025) and regional logistics reports, heavy rainfall and port closures across the Philippines, Hong Kong and southern China disrupted supply routes and delayed shipments of key semiconductor materials and substrates. Temporary shutdowns in Shenzhen and Cavite - both critical hubs for electronics assembly and testing - led to short-term slowdowns in exports bound for Japan, Europe and North America. Based on findings from Munich Re (2025), the storms also placed additional pressure on insurance and freight capacity, prompting rerouting of shipments through Singapore and Kaohsiung to minimise delays.

Despite these interruptions, analysts noted that the overall production impact remained contained, driven by enhanced disaster-response coordination and a more diversified manufacturing base across Southeast Asia. However, the events reinforced an emerging strategic imperative: as extreme weather patterns intensify, supply-chain resilience, redundancy and geographic diversification are becoming as vital to semiconductor competitiveness as technological innovation and capital efficiency.

Semiconductor Industry Heads into Year-End with AI Momentum and Strategic Rebalancing

The semiconductor industry is expected to sustain its upward trajectory through November and December 2025, driven by persistent AI infrastructure demand, expanding automotive electronics, and accelerated investment in advanced packaging and materials. According to Reuters (2025) and DIGITIMES Asia (2025), foundries such as TSMC, Samsung, and GlobalFoundries are maintaining strong utilization rates, particularly in 3–5 nm nodes and HBM (high-bandwidth memory) production. Meanwhile, analog and power semiconductor markets are stabilizing, supported by renewed momentum in industrial automation and electric vehicle supply chains.

Based on data from the Semiconductor Industry Association (SIA, 2025), global chip sales are expected to close the year near US$700 billion, reflecting double-digit growth over 2024. Supply constraints are gradually easing as new capacity in Japan, Southeast Asia, and the U.S. comes online, though analysts warn that AI-related components and advanced substrates will remain tight through early 2026. The electronics sector, in parallel, is forecast to see robust year-end shipments of smart devices, automotive systems, and energy-efficient solutions - signalling that while the cycle is maturing, AI-driven innovation and geopolitical diversification will continue to shape the semiconductor ecosystem into 2026.

Company Specific Updates

AMD

- AMD and OpenAI announced a multi-year agreement to deploy 6 GW of AMD's Instinct MI450 series GPUs for AI infrastructure, including OpenAI's option to acquire up to 10 % of AMD stock.
- AMD unveiled its "Helios" rack-scale AI hardware platform - built on the Open Rack Wide specification, with EPYC CPUs, Instinct GPUs and Pensando networking - aimed at next-gen AI data-centre workloads.
- AMD and Oracle Corporation expanded their AI partnership with Oracle planning to deploy 50,000 MI450 GPUs in 2026 under a larger multi-generation collaboration.

Infineon

- Infineon signed long-term Power Purchase Agreements to source renewable energy from wind farms in Brandenburg (Germany) and solar plants in Spain, advancing its sustainability strategy.
- The company launched an industry-first radiation-hardened buck controller with integrated gate drive (RIC70847) targeting space and extreme-environment power systems, illustrating its push in high-reliability semiconductors.
- Infineon reported the acquisition of 99,500 shares in its ongoing share buy-back programme during the week of 13-17 October, as part of its capital-return strategy.

Intel

- Intel announced its new laptop-chip architecture, Panther Lake, built on the 18A process at its Fab 52 facility, signalling a major push into next-gen AI-enabled PCs.
- The company revealed a forthcoming data-centre GPU, codenamed Crescent Island, optimised for inference workloads with 160 GB of onboard memory, aiming to regain ground in AI infrastructure.
- Intel scheduled its Q3 2025 financial results for 23 October, while reinforcing its commitment to U.S. manufacturing and national-security alignment with major domestic R&D and fab investments.

Nexperia

- Nexperia's Chinese unit resumed semiconductor sales to domestic distributors on October 23, under the condition that transactions be settled in Chinese yuan, after an earlier export ban.
- On October 29, Nexperia notified customers that wafer supplies to its Dongguan assembly plant were suspended due to payment disputes, raising concerns over automotive and electronics supply chains.
- Global automakers warned of chip shortage risks by October 29, citing Nexperia's export disruptions and urging urgent alternate sourcing to avoid production halts.

Panasonic

- Earlier in September, Panasonic invested ¥17 billion (~US$115 million) in a Thailand facility (Ayutthaya province) to produce copper materials for AI-server circuit boards, timed for launch in 2027 and mass production in fiscal 2028.
- Panasonic announced that its "The Land of NOMO" pavilion at Expo 2025 Osaka, Kansai, Japan reached its visitor target of 450,000 by 5 October, leveraging new co-creation insights with children and partners to feed future tech and business innovations.
- The company was honoured on 3 October in Vietnam as one of the top five brands contributing to sustainable development and the green transition, reflecting its commitments in the region to ESG and local social engagement.

Onsemi

- On 24 September, onsemi announced the planned acquisition of Aura Semiconductor's Vcore power-technology assets, fortifying its AI data-centre power-management portfolio.
- On 3 October 2025 the company set its sights on releasing its Q3 results ahead of market open on 3 November, reinforcing its ongoing focus on automotive and industrial power-semiconductor growth.
- A research report published in early October flagged that onsemi is navigating a cyclical downturn with some segments (especially automotive and industrial) declining in 2025, but is positioning for a rebound via its "Fab Right" strategy and AI/EV-oriented power-tech investments.

Vishay

- Vishay unveiled an expansion of its inductor and frequency-control device portfolio with 2,000+ new SKUs across nearly 100 series and announced capacity growth in Asia, Mexico and the Dominican Republic.
- The company introduced an AEC-Q200 qualified 50 W thick-film power resistor aimed at automotive applications, highlighting its push into high-reliability automotive components.
- Vishay released a new series of DLA-approved polymer capacitors (04051 series) for aerospace and defence, reflecting an emphasis on high-margin and mission-critical markets.

Texas Instruments

- TI launched new power-management chips and design resources (including modules supporting 12 V–48 V to 800 VDC architectures) in collaboration with NVIDIA Corporation, targeting next-generation AI data-centre infrastructures.
- TI forecast Q4 revenue between US$4.22 billion and US$4.58 billion, and EPS between US$1.13 and US$1.39 - both below analyst expectations - triggering an ~8% drop in after-hours stock trading.
- The board declared a US$1.42 per share quarterly dividend, payable 12 Nov 2025, underscoring TI's continued capital-return commitment amid near-term demand headwinds.

TDK

- TDK's prototype analog reservoir AI chip - developed with Hokkaido University - won the Innovation Award at CEATEC 2025 for its high-speed, low-power edge-AI capabilities.
- TDK announced a new technology partnership with Porsche Formula E Team, becoming its Official Technology Partner and supplying EV/gaming-relevant components and systems.
- TDK received the prestigious IEC 1906 Award for contributions to standardisation in electrical/electronic technology, underscoring its role in driving global industry standards.

Market updates

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Preventing problems in your supply chain

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