

Monthly Market Insights



**Rebound
Electronics**
A JABIL COMPANY

September 2026

Market Updates

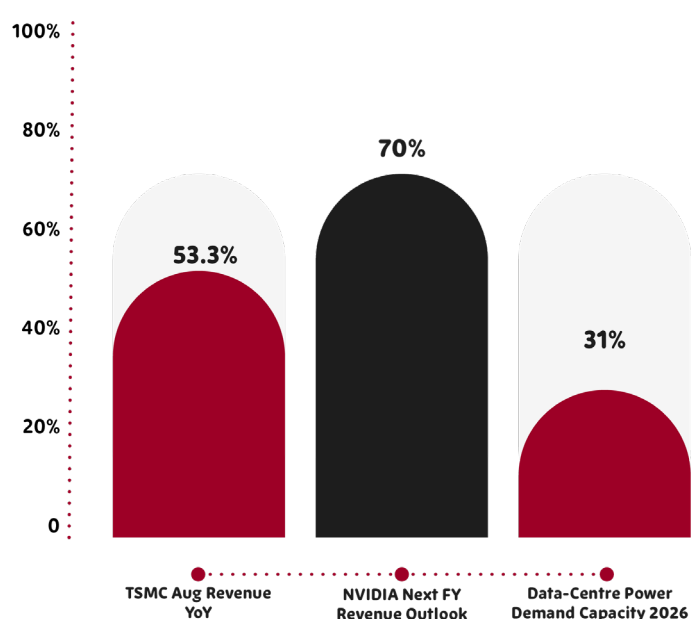


The latest market reporting indicates that the semiconductor industry remains supported by strong demand for AI infrastructure, advanced memory, networking and power components, although market conditions are becoming increasingly differentiated by product and end market. While capacity expansion is accelerating, much of the new investment will take time to come online and qualify. In the near term, selected memory, MLCC and high-specification PCB materials continue to face tighter supply and firmer pricing.

Overall, the period's indicators suggest that AI-related demand is continuing to drive semiconductor revenues and infrastructure investment.

These figures should not be viewed as directly comparable measures of total market size, but rather as selected indicators of the direction and intensity of current demand.

Selected semiconductor demand and capacity signals reported 15 Aug-22 Sep 2026



Source:

Figure 1: Selected semiconductor demand and Capacity Signals (Aug 15-Sep22,2026)

The broader semiconductor market remains supported by strong foundry demand, AI infrastructure investment and rising data-centre requirements. TSMC's August revenue growth, continued expectations for strong NVIDIA demand, a projected 31% increase in data-centre power capacity and growing adoption of large 2.5D packages all point to sustained investment across AI chips, advanced packaging and supporting infrastructure.

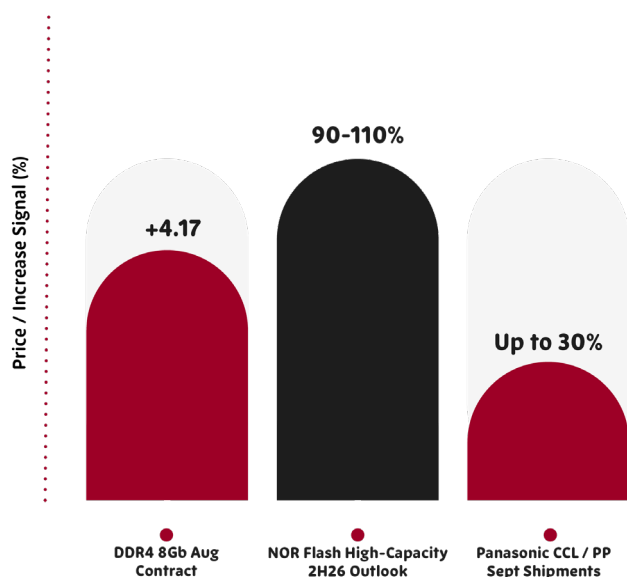
Memory Outlook

Memory pricing is continuing to firm as AI and HBM demand absorbs capacity, with DDR4, NOR Flash and enterprise SSDs all facing upward price pressure. The market is becoming increasingly application-specific, as suppliers prioritise AI/HBM and enterprise storage while tighter capacity allocation also affects legacy memory products.

PPV Pricing Environment

Current pricing signals are broader than semiconductor wafers alone. September reporting points to continued manufacturer repricing across selected ICs and materials, making PPV management increasingly relevant for procurement and sales teams. The focus is shifting from blanket market-wide increases towards part-, customer- and application-specific adjustments.

Component Pricing Pressure: Selected Reported Signals



AI-related demand is continuing to drive semiconductor revenues and infrastructure investment.

The clearest current pricing pressure is visible in memory and AI-linked materials. The chart deliberately combines different reported indicators rather than presenting them as a single index, highlighting where buyers are most likely to encounter higher quotations or tighter allocation.

MLCCs

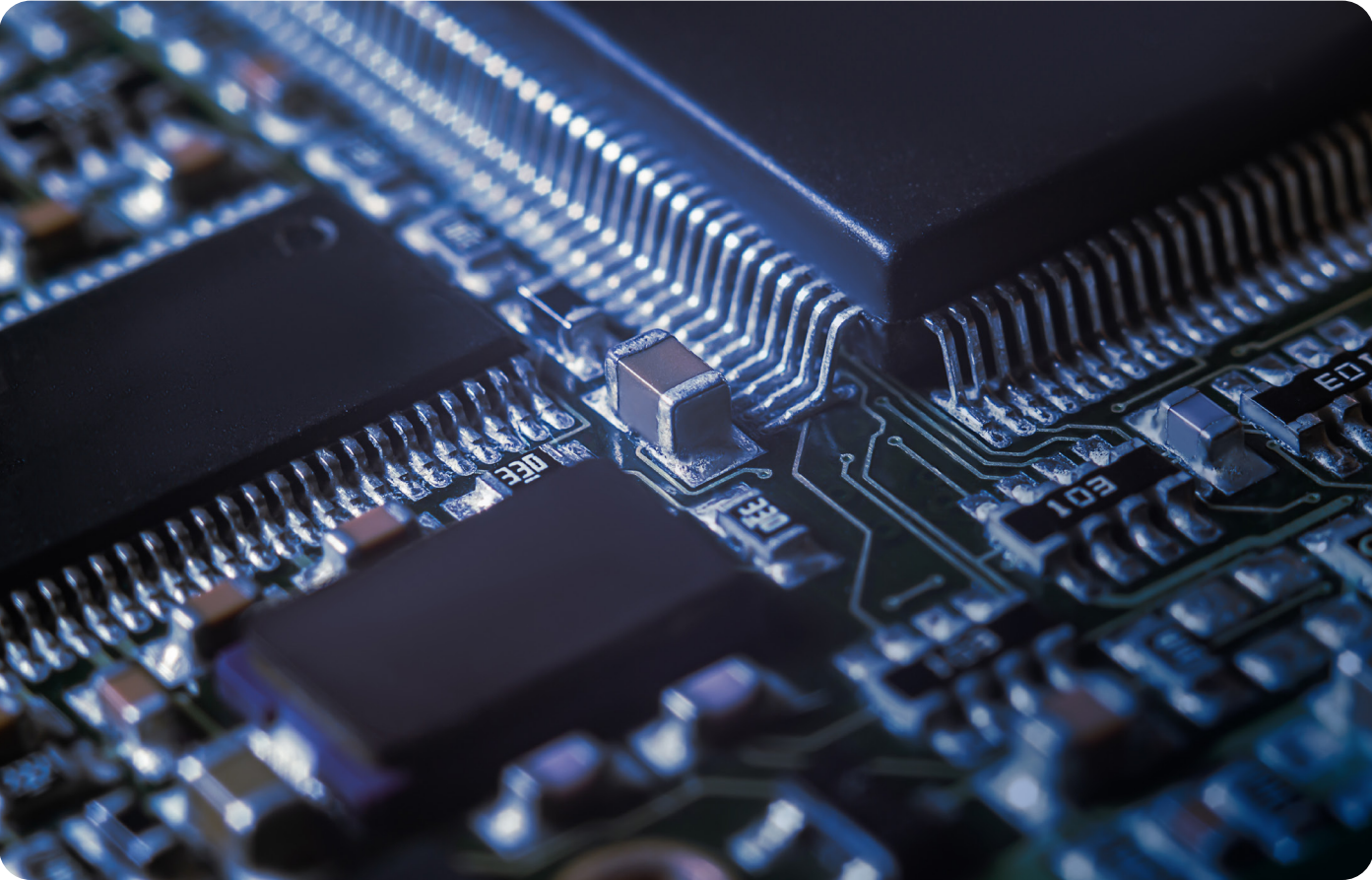
MLCC Market Upcycle

The MLCC market is showing signs of an upcycle, with Samsung Electro-Mechanics raising 4Q26 OEM/ODM prices as AI-server demand strengthens. Japanese and Korean suppliers are shifting capacity towards higher-value applications, while Chinese manufacturers continue expanding in low- and mid-range segments.

AI Reshaping MLCC Requirements

AI and data-centre growth is also reshaping the technical requirements for MLCCs, with greater demand for higher capacitance, voltage and temperature ratings in smaller package sizes. As manufacturers prioritise these advanced components for power stability, filtering and decoupling, tighter supply is contributing to longer lead times and higher prices.

Market Updates



PCBs / CCL / Prepreg

AI-server demand is supporting stronger momentum across CCL and PCB supply chains, with Taiwanese CCL makers benefiting from higher pricing and product-mix upgrades. Panasonic’s price increases of up to 30% for CCL and prepreg, alongside the move towards 52-layer PCB designs and M9-class materials, reflect the increasing material and performance requirements of AI servers.

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New Fabs and Manufacturing Outlook

Location / Company	Development	Market Relevance
SK Hynix (West Lafayette, Indiana)	Groundbreaking for >US\$4bn advanced HBM packaging facility; mass production targeted for H2 2029.	Adds US-based advanced memory packaging capacity and supports AI-memory supply diversification.
Tata Electronics (Dholera, Gujarat)	Multiple partnerships announced covering fab infrastructure, materials and supply-chain readiness for the Dholera silicon fab.	Signals ecosystem build-out around an upcoming front-end manufacturing site.
TSMC / Baipu Industrial Park (Kaohsiung, Taiwan)	Ground broken for advanced-packaging industrial park, including TSMC validation and training facilities.	Extends Taiwan's advanced-packaging and AI/HPC manufacturing ecosystem.

Automotive and EV Outlook

Automotive semiconductor demand is showing signs of recovery, although selected MCUs and power devices remain tight.

Growth continues to be driven by software-defined vehicles, electrification, battery management, ADAS and rising semiconductor content per vehicle, while long qualification cycles and lifecycle requirements continue to keep procurement conditions product-specific.



Healthcare / MedTech

Healthcare remains a semiconductor-intensive sector, supported by growing demand for imaging, diagnostics, monitoring, ultrasound, sensors and connected medical devices. Recent developments, including Butterfly Network's integration of imaging hardware, semiconductor technology, cloud software and AI, highlight the industry's shift towards increasingly connected and compute-enabled medical equipment.

Demand & Supply

AI accelerators, HBM, enterprise SSDs, advanced packaging, high-speed networking, power management and AI-server components remain the strongest areas of semiconductor demand. Although capacity is expanding, long fab and packaging construction and qualification timelines mean supply remains uneven, with pricing pressure particularly visible across selected memory, MLCC, CCL/prepreg and IC categories.

Geopolitics Outlook

China's continued dominance of gallium, germanium and rare-earth supply is keeping critical-material security high on the semiconductor agenda. With diversification efforts facing technical, economic and capacity constraints, companies are increasingly focused on sourcing diversification, regional manufacturing and securing strategic materials to reduce supply-chain exposure.

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CURRENT PRICING SIGNALS
ARE BROADER THAN
SEMICONDUCTOR WAFERS
ALONE.
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Company-Specific Updates

AMD

- **AI / Product:** AMD continued scaling its Instinct and EPYC platforms as AI demand drives strong data-centre growth and customer deployments.
 - **Supply:** AMD's expanding AI accelerator deployments point to continued demand for advanced packaging, high-bandwidth memory and supporting components.
 - **Market:** Strong AI infrastructure spending remains a key driver of AMD's data-centre business heading into the second half of 2026.
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Infineon Technologies

- **Portfolio:** Infineon agreed to sell its NOR Flash and F-RAM business to Winbond for US\$1.12bn, sharpening its focus on core growth areas.
 - **AI Power:** The company introduced new power-management technologies targeting higher-density AI accelerator and data-centre applications.
 - **Automotive:** Infineon launched a new power-management IC integrating power and safety functions for hybrid and electric-vehicle traction inverters.
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Intel

- **Fab / Supply:** SK Hynix was reported to be exploring a potential arrangement to manufacture memory in Intel's Ohio facility, although no final production agreement had been confirmed.
- **Capacity:** The discussions highlight continued efforts to expand US-based semiconductor and memory manufacturing capacity.
- **AI / Memory:** Rising AI-driven demand for DRAM and HBM is increasing pressure for additional geographically diversified memory production.

onsemi

- **New Product:** onsemi unveiled its Embedded Power Platform, targeting AI data centres and electric vehicles with up to three-to-five times higher power density than existing solutions.
 - **Supply / Development:** The platform is expected to begin sampling with selected automotive and AI customers during 2026.
 - **AI Infrastructure:** The launch reflects onsemi's growing focus on high-density power delivery for AI infrastructure and electrification.
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Panasonic

- **AI Infrastructure:** Panasonic raised its full-year outlook in August, citing growing demand from AI infrastructure-related and adjacent businesses.
 - **Investment:** Panasonic Energy launched a new global battery R&D hub in Japan focused on automotive and data-centre applications.
 - **Manufacturing:** Panasonic Industry announced the transfer of its manufacturing subsidiaries in Germany and Slovakia as part of its portfolio restructuring.
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TDK

- **MLCC:** TDK launched a low-resistance soft-termination X7R MLCC rated at 10 μ F/100 V for AI servers, humanoids and xEVs.
- **Power:** TDK introduced 12.5 kW three-phase power supplies for distributed power architectures, supporting higher-power applications.
- **AI Components:** TDK expanded its ultra-compact aluminium electrolytic capacitor range for AI servers, including models with voltage ratings up to 500 V.

Texas Instruments

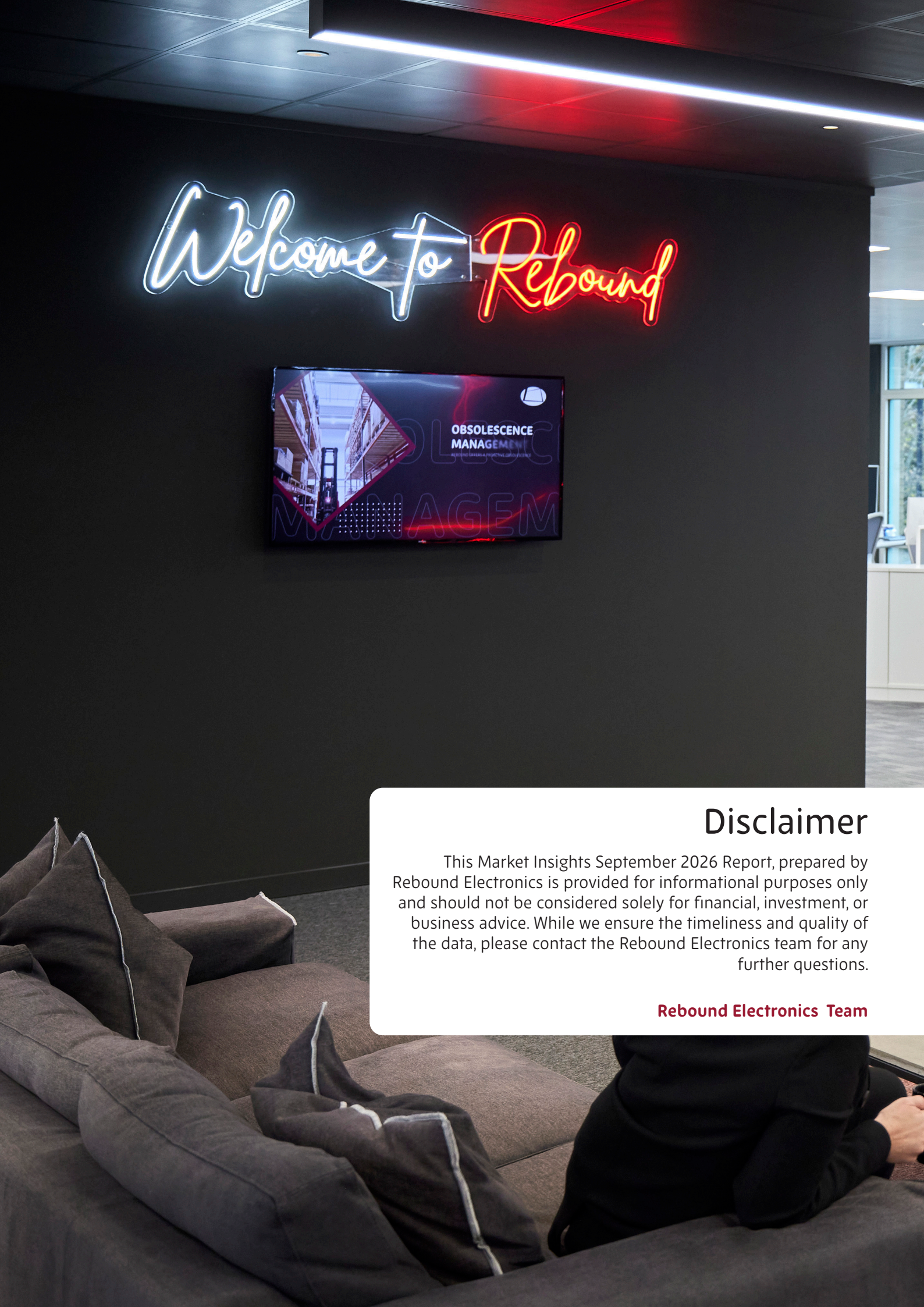
- **New Product:** TI introduced a new multiaxial current-sensing architecture offering up to 20× greater accuracy for HEV and EV traction inverters.
 - **Automotive:** The technology is designed to support more compact and efficient power systems in next-generation electric and hybrid vehicles.
 - **Portfolio:** TI continues to expand its analogue and power-management portfolio around automotive electrification and higher-efficiency systems.
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TSMC

- **Demand:** TSMC reported August 2026 revenue of NT\$514.8bn, up 53.3% YoY, reflecting continued strong foundry demand.
 - **Advanced Manufacturing:** Strong AI demand continues to support investment in advanced nodes and packaging capacity as customers scale next-generation accelerators.
 - **Supply:** The sustained growth reinforces continued capacity expansion across advanced process and packaging technologies.
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Vishay

- **New Product:** Vishay introduced new standard rectifiers supporting current ratings up to 12 A in its DFN6546A power package.
- **Power:** The company launched a new bidirectional TVS device designed to provide low clamping voltage and high power density.
- **Automotive / Sensing:** Vishay expanded its product range with a 45 mm inductive position sensor encoder designed for reliable operation near electric motors.



Welcome to Rebound



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Custom Solutions for Every Stage of Your Supply Chain

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