Q4 2024 Lead Time Report

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A Quiet Fourth Quarter Sets the Stage for a Low-Key 2025

Stabilization is on the way with the exception of a few key markets.

After years of volatility, the semiconductor industry slowly began to show signs of stabilization near the end of 2024, as excess inventory was mitigated thanks to stringent efforts by suppliers to stem further excess through strategic production cuts.

Thanks to stringent efforts by suppliers to stem further excess through strategic production cuts. However, flat consumer demand kept prices for many market sectors, especially general DRAM and NAND-flash, low. Lead times declined and remained relatively stable, except for components used in AI applications.

These components saw remarkable demand spikes contributing to shortage-like conditions, specifically in high-bandwidth memory (HBM) and solid-state drives (SSDs).

Flat consumer demand has contributed significantly to this stability, as reduced end-market activity has led to low spot market prices. Rather than placing aggressive buy-ahead orders, procurement teams have drawn down excess inventory to fill production backlogs, further dampening the urgency for new purchases and reinforcing the subdued market conditions.

However, lead times remained stable over most of Q4 despite the end-of-the-year shopping season. TrendForce data revealed that industry experts forecast that prices will remain low through 1H25 until better stabilization in 2H25.

The market rebounded strongly despite low demand and even lower spot market prices, and some industry professionals believe 2025 might not reach similar highs outside of specific markets like AI and high-performance computing (HPC).

Comparatively, after significant stabilization in 3Q2024, the passive component market is now experiencing rising lead times due to ongoing geopolitical tension from the U.S.-China trade war. This shift stemmed from new restrictions enacted by China on critical raw materials such as gallium, germanium, and antimony, which led to increased prices and limited alternate sources.

The U.S. then responded with its restrictions, further constraining the flow of advanced chips and chipmaking technology.

With President-elect Donald Trump's upcoming tenure in the United States, the semiconductor industry is bracing for the possibility of more trade war restrictions. Trump has been vocal about his plans to impose new tariffs on countries like Taiwan to boost United States semiconductor production. This includes comments that might impact the well-received CHIPS and Science Act.

Many chipmakers, including Applied Materials, have been critical of the U.S.'s increasing restrictions on chipmaking technologies in China. As a result, they have elected to "wait and see" how the industry might be impacted once Trump takes office.

SEMICONDUCTOR MARKET TRENDS

Volatile Memory

Future Lead Times	Stable
Price	Mostly Stable

Artificial intelligence will continue to fuel demand in the DRAM market sector, specifically for HBM and other AI-aligned components. Experts believe that DRAM market demand will remain primarily flat during the first half of 1H25 before greater stabilization occurs. The average lead time is between 12 - 16 weeks.

ISSI's prices are trending down across SRAM/PSRAM and DDR4 products.

Micron's DDR2 and DDR3 are beginning to see lead times increase over Q1.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE	COMMENTS
		CURRENT	FUTURE TREND (NEXT 3 MONTHS)	FUTURE TREND (NEXT 3 MONTHS)	
SRAM/PSRAM	Infineon	8 - 10 weeks	Stable –	Stable –	
	Renesas	16 - 20 weeks	Stable –	Stable –	
	ISSI	9 - 15 weeks	Stable –	Down ▼	Asynchronous 6- 8 weeks, Synchronous 10-12 weeks.
DRAM/RLDRAM	ISSI	8 - 10 weeks	Stable –	Stable –	
	Kingston	1 - 6 weeks	Stable –	Stable –	
DDRII/DDR3/DDR5	Micron	10 - 12 weeks	Stable –	Up ▲	DDRII and DDR3 will see lead time increase in Q1. DDR5 will stay stable at 22 - 24 weeks.
	Samsung	12 - 24 weeks	Stable –	Stable –	
DDR4/LPDDR4	Micron	20 - 24 weeks	Stable –	Stable –	
	Samsung	12 - 16 weeks	Stable –	Stable –	
	ISSI	10 - 12 weeks	Stable –	Down ▼	

SEMICONDUCTOR MARKET TRENDS

Non-Volatile Memory

Future Lead Times — Stable

Price — Mostly Stable

Like the DRAM sector, NAND demand will remain relatively flat through most of 1H25, except for artificial intelligence parts. The average lead time is between 10 and 14 weeks.

Infineon's sNOR products will remain stable in lead time and price, while its pNOR products will experience price hikes.

Micron will continue to increase prices for its NAND Flash products over 1Q25.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE	COMMENTS
		CURRENT	FUTURE TREND (NEXT 3 MONTHS)	FUTURE TREND (NEXT 3 MONTHS)	
Flash-NOR	ISSI	10 - 12 weeks	Stable –	Stable –	Price is currently trending down and will remain stable.
	Infineon	8 - 10 weeks	Stable –	Up ▲	pNOR pricing will increase, sNOR will remain stable.
	Macronix	10 - 12 weeks	Stable –	Stable –	
	Micron	10- 12 weeks	Stable –	Stable –	
Flash-NAND	ISSI	8 - 10 weeks	Stable –	Stable –	
	Macronix	10 - 12 weeks	Stable –	Stable –	
	Microchip	4 - 7 weeks	Stable –	Stable –	
	Micron	20- 24 weeks	Stable –	Up ▲	Lead time is increasing through Q1.
	Western Digital	6 - 8 weeks	Stable –	Stable –	
FRAM/NVRAM	Infineon	8 weeks	Stable –	Stable –	
	STMicroelectronics	16 - 24 weeks	Stable –	Stable –	
EEPROM	Microchip	7 - 9 weeks	Stable –	Stable –	
	Onsemi	20 - 24 weeks	Stable –	Stable –	
	Renesas	16- 20 weeks	Stable –	Stable –	
	STMicroelectronics	4 - 18 weeks	Stable –	Stable –	

SEMICONDUCTOR MARKET TRENDS

Storage

Future Lead Times Stable

Price Stable

Artificial intelligence demand continues to fuel orders for SSDs and other enterprise storage products. Lead times remain stable as suppliers increase capacity for popular products. The average lead time is around 10 - 14 weeks.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE	COMMENTS
		CURRENT	FUTURE TREND (NEXT 3 MONTHS)	FUTURE TREND (NEXT 3 MONTHS)	
eMMC	ISSI	8 - 10 weeks	Stable –	Stable –	Price is currently trending down and will remain stable.
	Kingston	4 - 6 weeks	Stable –	Stable –	
	Macronix	10 - 12 weeks	Stable –	Stable –	
	Western Digital	6 - 8 weeks	Stable –	Stable –	
SSD	Kingston	2 - 4 weeks	Stable –	Stable –	
	Micron	16 - 18 weeks	Stable –	Stable –	
	Samsung	12 - 16 weeks	Stable –	Stable –	
	Western Digital	6 - 8 weeks	Stable –	Stable –	
Cards	Western Digital	16 - 18 weeks	Stable –	Stable –	

SEMICONDUCTOR MARKET TRENDS

Discrete

Future Lead Times	Stable
Price	Stable, Going Down

Lead times are holding steady thanks to increased investments by suppliers the previous year. Prices continue to drop across suppliers, with the average lead time between 10 - 16 weeks.

Onsemi's prices for its Bi-polar, Rectifier, MOSFET HV, Power WBG, TVS/Protection, Zener diode, Coupler, and Small Signal products will continue decreasing.

Vishay's pricing for Rectifiers is low but will remain stable.

Infineon's MOSFETs are seeing increased lead times over Q1.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE	COMMENTS
		CURRENT	FUTURE TREND (NEXT 3 MONTHS)	FUTURE TREND (NEXT 3 MONTHS)	
Diodes	Diodes Inc.	8 - 12 weeks	Stable –	Stable –	
	Nexperia	6 - 8 weeks	Stable –	Down ▾	Pricing is trending down and will continue through 1Q25.
	Onsemi	8 - 12 weeks	Stable –	Stable –	
	Taiwan Semiconductor	10 - 12 weeks	Stable –	Stable –	
	Toshiba	10 - 12 weeks	Stable –	Stable –	
	Vishay	8 - 14 weeks	Stable –	Stable –	
	WeEn Semiconductor	8 - 12 weeks	Stable –	Stable –	

SEMICONDUCTOR MARKET TRENDS

Discrete

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE	COMMENTS
		CURRENT	FUTURE TREND (NEXT 3 MONTHS)	FUTURE TREND (NEXT 3 MONTHS)	
Bi-polar	Diodes Inc.	8 - 14 weeks	Stable –	Stable –	
	Infineon	12 - 28 weeks	Stable –	Stable –	
	Nexperia	4 - 8 weeks	Stable –	Down ▼	Pricing is trending down and will continue through 1Q25.
	Onsemi	10 - 14 weeks	Stable –	Down ▼	Pricing is trending down and will continue through 1Q25.
	STMicroelectronics	16 - 18 weeks	Stable –	Stable –	
	Taiwan Semiconductor	10 - 12 weeks	Stable –	Stable –	
	WeEn Semiconductor	14 - 16 weeks	Stable –	Stable –	
Small Signal	Diodes Inc.	8 - 14 weeks	Stable –	Stable –	
	Nexperia	4 - 8 weeks	Stable –	Stable –	
	Onsemi	12 - 15 weeks	Stable –	Down ▼	Pricing is trending down and will continue through Q1.
	STMicroelectronics	14 - 18 weeks	Stable –	Stable –	
	Taiwan Semiconductor	10 - 12 weeks	Stable –	Stable –	
	Vishay	8 - 16 weeks	Stable –	Stable –	
MOSFETs	Diodes Inc.	8 - 16 weeks	Stable –	Stable –	
	Infineon	36 - 40 weeks	Up ▲	Stable –	
	Nexperia	6 - 10 weeks	Stable –	Down ▼	
	Onsemi	20 - 23 weeks	Stable –	Stable –	
	STMicroelectronics	16 - 18 weeks	Stable –	Stable –	
	Taiwan Semiconductor	16 weeks	Stable –	Stable –	
	Toshiba	20 - 24 weeks	Stable –	Stable –	
	Vishay	10 - 18 weeks	Stable –	Stable –	
TVS/Protection	Diodes Inc.	8 - 16 weeks	Stable –	Stable –	
	Nexperia	6 - 8 weeks	Stable –	Down ▼	Pricing is trending down and will continue through 1Q25.
	Onsemi	14 - 18 weeks	Stable –	Stable –	
	STMicroelectronics	14 - 18 weeks	Stable –	Stable –	
	Taiwan Semiconductor	8 weeks	Stable –	Stable –	
	Toshiba	10 - 14 weeks	Stable –	Stable –	
	Vishay	8 - 14 weeks	Stable –	Stable –	

SEMICONDUCTOR MARKET TRENDS

Discrete

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE	COMMENTS
		CURRENT	FUTURE TREND (NEXT 3 MONTHS)	FUTURE TREND (NEXT 3 MONTHS)	
Coupler	Broadcom	24 - 32 weeks	Stable –	Stable –	
	Onsemi	14 - 18 weeks	Stable –	Stable –	Current price is trending down and will remain stable.
	Vishay	4 - 10 weeks	Stable –	Stable –	
Power WBG	Infineon	36 - 40 weeks	Stable –	Stable –	
	Microchip	8 - 26 weeks	Stable –	Stable –	
	Onsemi	18 - 20 weeks	Stable –	Stable –	Current price is trending down and will remain stable.
RF	Microchip	8 - 12 weeks	Stable –	Stable –	
	Infineon	20 - 48 weeks	Stable –	Stable –	
	NXP	10 - 26 weeks	Stable –	Stable –	
Thyristors/Triacs/ IGBT	WeEn Semiconductors	8 weeks	Stable –	Stable –	
	STMicroelectronics	20 - 24 weeks	Stable –	Stable –	
Rectifiers	Diodes Inc.	8 - 12 weeks	Stable –	Stable –	
	STMicroelectronics	12 - 16 weeks	Stable –	Stable –	
	Taiwan Semiconductor	12 weeks	Stable –	Stable –	
	Toshiba	12 - 18 weeks	Stable –	Stable –	
	WeEn Semiconductors	8 - 12 weeks	Stable –	Stable –	
	Onsemi	10 - 14 weeks	Stable –	Stable –	Current price is trending down and will remain stable.
	Vishay	8 - 20 weeks	Stable –	Stable –	Current price is trending down and will remain stable.

SEMICONDUCTOR MARKET TRENDS

Logic

Future Lead Times	Stable
Price	Stable

Price trends and lead times remain stable as low demand continues to set the pace in the buying market. The average lead time is 12 - 16 weeks.

Onsemi will continue to see prices decrease across their standard logic products.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE	
		CURRENT	FUTURE TREND (NEXT 3 MONTHS)	FUTURE TREND (NEXT 3 MONTHS)	
Programmable	AMD	12 - 20 weeks	Stable –	Stable –	
	Infineon	20 - 24 weeks	Stable –	Stable –	
	Microchip	12 - 16 weeks	Stable –	Stable –	
Standard	Nexperia	8 - 12 weeks	Stable –	Stable –	
	Onsemi	12 - 16 weeks	Stable –	Down ▾	Pricing is trending down through Q1.
Logic IC	Toshiba	20 - 24 weeks	Stable –	Stable –	

SEMICONDUCTOR MARKET TRENDS

Advanced Analog

Future Lead Times Stable

Price Stable

Lead time and price remain stable as demand remains flat, likely due to excess inventory still impacting consumers. This trend will likely continue throughout 4Q24 and into 1Q25. The average lead time is around 10 - 24 weeks.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE	COMMENTS
		CURRENT	FUTURE TREND (NEXT 3 MONTHS)	FUTURE TREND (NEXT 3 MONTHS)	
Dataconverters	Microchip	6 - 10 weeks	Stable –	Stable –	
	Renesas	12 - 48 weeks	Stable –	Stable –	
	STMicroelectronics	12 - 20 weeks	Stable –	Stable –	
OPA	Microchip	5 - 9 weeks	Stable –	Stable –	
	MPS	26 - 30 weeks	Stable –	Stable –	
	NXP Semiconductor	15 - 26 weeks	Stable –	Stable –	
	Onsemi	12 - 14 weeks	Stable –	Down ▼	Pricing will trend down through Q1.
	STMicroelectronics	12 - 20 weeks	Stable –	Stable –	
Interfaces (LVDS,UART USB)	Microchip	6 - 8 weeks	Stable –	Stable –	
	MPS	24 - 28 weeks	Stable –	Stable –	
	NXP Semiconductor	10 - 26 weeks	Stable –	Stable –	
	Renesas	32 - 48 weeks	Stable –	Stable –	
	STMicroelectronics	12 - 26 weeks	Stable –	Stable –	
Power Management (Low Drop, PWM, Switching Reg.)	Infineon	22 - 50 weeks	Up ▲	Stable –	
	Microchip	7 - 9 weeks	Stable –	Stable –	
	MPS	30 - 32 weeks	Stable –	Stable –	
	Onsemi	12 - 22 weeks	Stable –	Stable –	
	STMicroelectronics	10 - 18 weeks	Stable –	Stable –	
Multimedia Products	MPS	28 - 30 weeks	Stable –	Stable –	
Analog	Toshiba	12 - 16 weeks	Stable –	Stable –	

SEMICONDUCTOR MARKET TRENDS

Embedded Processing

8-Bit Lead Time/Price	Stable, Going Up
16-Bit Lead Time/Price	Stable, Going Up
32-Bit Lead Time/Price	Stable, Going Up
MCU Lead Time/Price	Stable

Lead times are trending upward through Q1 as excess inventory is mitigated and procurement teams look to fill backlogs. The current average lead time is between 11 - 25 weeks.

Microchip's 8-bit, 16-bit, and 32-bit products are seeing lead times increase.

NXP's 8-bit, 16-bit, and 32-bit products are seeing lead times increase.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE	COMMENTS
		CURRENT	FUTURE TREND (NEXT 3 MONTHS)	FUTURE TREND (NEXT 3 MONTHS)	
8-Bit	Infineon	12 - 36 weeks	Stable –	Stable –	
	Microchip	6 - 10 weeks	Up ▲	Stable –	Lead times trending up through Q1.
	NXP Semiconductor	12 - 52 weeks	Up ▲	Stable –	Lead times trending up through Q1.
	STMicroelectronics	13 - 20 weeks	Stable –	Stable –	
16-Bit	Infineon	12 - 36 weeks	Stable –	Stable –	
	Microchip	6 - 11 weeks	Up ▲	Stable –	Lead times trending up through Q1.
	NXP Semiconductor	12 - 52 weeks	Up ▲	Stable –	Lead times trending up through Q1.
	STMicroelectronics	13 - 20 weeks	Stable –	Stable –	
32-Bit	Infineon	12 - 36 weeks	Stable –	Stable –	
	Microchip	6 - 12 weeks	Up ▲	Stable –	Lead times trending up through Q1.
	NXP Semiconductor	12 - 52 weeks	Up ▲	Stable –	Lead times trending up through Q1.
	STMicroelectronics	13 - 20 weeks	Stable –	Stable –	
MCU	Renesas	20 - 48 weeks	Stable –	Stable –	

SEMICONDUCTOR MARKET TRENDS

Optoelectronics

Future Lead Times	Stable
Price	Stable

Lead time and price have remained stable, and this trend will likely continue through the rest of 1H25. The average lead time is 11 - 14 weeks.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE	COMMENTS
		CURRENT	FUTURE TREND (NEXT 3 MONTHS)	FUTURE TREND (NEXT 3 MONTHS)	
High Power (IR, Visible, Laser, LED)	amsOSRAM	8 - 16 weeks	Stable –	Stable –	
	Broadcom	13- 24 weeks	Stable –	Stable –	
Low Power (IR, Visible, Laser, LED)	amsOSRAM	10 -12 weeks	Stable –	Stable –	
	Broadcom	13 - 25 weeks	Stable –	Stable –	

SEMICONDUCTOR MARKET TRENDS

Sensors

Future Lead Times	Stable
Price	Stable

Lead times remain primarily stable, as growing capacity helps keep the market level. However, due to low demand across the industry, lead times are dropping for some suppliers. The average lead time is around 16 - 25 weeks.

STMicroelectronics will continue to see lead times decrease on Accelerometers, T&H, and Time of Flight sensors.

Vishay's slotted interruptors will see lead times trend down through 1Q25.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE	
		CURRENT	FUTURE TREND (NEXT 3 MONTHS)	FUTURE TREND (NEXT 3 MONTHS)	
Pressure	Amphenol	10 - 14 weeks	Stable –	Stable –	
	Infineon	14 - 18 weeks	Stable –	Stable –	
	NXP Semiconductor	18 - 26 weeks	Stable –	Stable –	
	STMicroelectronics	20 - 22 weeks	Stable –	Stable –	
	TE Connectivity	16 - 24 weeks	Stable –	Stable –	
Time of Flight	amsOSRAM	18 - 22 weeks	Stable –	Stable –	
	Broadcom	12 weeks	Stable –	Stable –	
	Infineon	14 - 18 weeks	Stable –	Stable –	
	STMicroelectronics	16 - 22 weeks	Down ▾	Stable –	Lead times will continue trending down through Q1.
	TE Connectivity	16 - 24 weeks	Stable –	Stable –	
Position	amsOSRAM	24 - 28 weeks	Stable –	Stable –	
	Broadcom	18 - 26 weeks	Stable –	Stable –	
	Infineon	18 - 24 weeks	Stable –	Stable –	
	TE Connectivity	15 - 60 weeks	Stable –	Stable –	
	Vishay	15 - 60 weeks	Stable –	Stable –	Proximity sensors by Vishay.
Image	amsOSRAM	28 - 34 weeks	Stable –	Stable –	

SEMICONDUCTOR MARKET TRENDS

Sensors

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE	
		CURRENT	FUTURE TREND (NEXT 3 MONTHS)	FUTURE TREND (NEXT 3 MONTHS)	
T & H	Amphenol	2 - 16 weeks	Stable –	Stable –	
	amsOSRAM	18 - 22 weeks	Stable –	Stable –	
	STMicroelectronics	16 - 20 weeks	Down ▾	Stable –	Lead times will continue trending down.
	TE Connectivity	17 - 22 weeks	Stable –	Stable –	
Sensors	Microchip	8 - 15 weeks	Stable –	Stable –	
	MPS	24 - 30 weeks	Stable –	Stable –	
	Vishay	4 - 26 weeks	Stable –	Stable –	Vishay light sensors.
Accelerometers	NXP Semiconductor	18 - 26 weeks	Stable –	Stable –	
	STMicroelectronics	16 - 18 weeks	Down ▾	Stable –	Lead times will continue trending down through Q1.
	TE Connectivity	16 - 46 weeks	Stable –	Stable –	
ALS	amsOSRAM	18 - 22 weeks	Stable –	Stable –	
	Broadcom	26 - 36 weeks	Stable –	Stable –	
Slotted Interrupters/ MEMS	Vishay	6 -10 weeks	Down ▾	Stable –	Vishay slotted interrupters will see lead times trending down through 1Q25.
	NXP Semiconductor	18 - 26 weeks	Stable –	Stable –	MEMS by NXP.

PEMCO MARKET TRENDS

Passives

Future Lead Times	Mostly Stable, Going Up
Price	Mostly Stable

Lead time stabilization continues across the passive component market. Some demand areas remain, contributing to rising lead times, especially in areas recently impacted by geopolitical tension. Price remains mostly stable across suppliers. The average lead time is around 20 - 32 weeks.

Panasonic's Thin Film Resistors are experiencing higher lead times than Thick Film Resistors at 18 - 20 weeks.

Vishay's Trimmers and Thin-Film Resistors have longer lead times than other products, at 35 - 52 weeks and 18 - 40 weeks, respectively. The lead times for Vishay's M55342 Military Resistors and Tantalum Polymer Capacitors will rise over 1Q25.

Kemet/Yageo is seeing lead times increase across several products, specifically in Tantalum Polymer and Aluminium Capacitors.

Kyocera AVX is seeing lead times increase in Tantalum Polymer Capacitors.

Samsung, TDK, Kemet/Yageo, and **Kyocera AVX** all see lead times trending high for their MLCC high CV products.

PEMCO MARKET TRENDS

Passives

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE	COMMENTS
		CURRENT	FUTURE TREND (NEXT 3 MONTHS)	FUTURE TREND (NEXT 3 MONTHS)	
Resistors Thick & Thin Film	Bourns	14 - 32 weeks	Stable –	Stable –	
	Kemet/Yageo	12 - 14 weeks	Stable –	Stable –	
	Panasonic	16 - 24 weeks	Stable –	Stable –	Thin Film lead time 18 - 20 weeks.
	Vishay	12 - 16 weeks	Stable –	Stable –	Thin Film lead time 18 - 40 weeks.
Resistors Networks & Arrays	Bourns	14 - 20 weeks	Stable –	Stable –	
	Panasonic	18 - 20 weeks	Stable –	Stable –	
	Vishay	15 - 38 weeks	Stable –	Stable –	
Resistors Trimmers & Wirewound	Panasonic	35 - 52 weeks	Stable –	Stable –	
	Vishay	12 - 36 weeks	Stable –	Stable –	Vishay trimmers have a lead time of 35 -52 weeks. Vishay wirewound resistors are up in price, but will remain stable.
Capacitors Aluminium	Kemet/Yageo	20 - 46 weeks	Up ▲	Stable –	Aluminium electrolytic capacitors will remain stable at 24- 32 weeks.
	Panasonic	20 - 52 weeks	Up ▲	Stable –	Aluminium polymer capacitors will remain stable at 20 - 52 weeks.
	TDK	17 - 36 weeks	Stable –	Stable –	
Inductors	Bourns	24 - 42 weeks	Stable –	Stable –	
	Kemet/Yageo	16 - 52 weeks	Stable –	Stable –	
	Kyocera AVX	14 - 18 weeks	Stable –	Stable –	
	Murata	8 - 52 weeks	Stable –	Stable –	
	Samsung	26 - 52 weeks	Stable –	Stable –	
	Taiyo Yuden	10 - 32 weeks	Stable –	Stable –	
	TDK	14 - 25 weeks	Stable –	Stable –	
	Vishay	10 - 20 weeks	Stable –	Stable –	

PEMCO MARKET TRENDS

Passives

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE	COMMENTS
		CURRENT	FUTURE TREND (NEXT 3 MONTHS)	FUTURE TREND (NEXT 3 MONTHS)	
Film Caps	Kemet/Yageo	29 - 46 weeks	Stable –	Stable –	Pricing is currently high, but will remain stable through 1Q25.
	Kyocera AVX	20 - 32 weeks	Stable –	Stable –	
	TDK	30 -52 weeks	Stable –	Stable –	
Capacitors Ceramic Multilayer (MLCC)	Kemet/Yageo	7 - 32 weeks	Up ▲	Stable –	MLCC high CV lead time is trending upward with current LTs at 18 - 50 weeks.
	Kyocera AVX	10 - 28 weeks	Up ▲	Stable –	MLCC high CV lead time is trending upward with current LTs at 12 - 24 weeks.
	Murata	10 - 50 weeks	Stable –	Stable –	
	Samsung	16 - 22 weeks	Up ▲	Stable –	MLCC high CV lead time is trending upward with current LTs at 16 - 22 weeks.
	Taiyo Yuden	10 - 32 weeks	Stable –	Stable –	
	TDK	12 - 44 weeks	Up ▲	Stable –	MLCC high CV lead time is trending upward with current LTs at 24 - 44 weeks.
	Vishay	10 - 32 weeks	Stable –	Up ▲	Pricing for leaded ceramics is high and trending upward over 1Q25.
Capacitors Tantalum Standard/Low ESR	Kemet/Yageo	8 - 14 weeks	Stable –	Stable –	
	Kyocera AVX	3 - 17 weeks	Stable –	Stable –	
	Vishay	12 - 18 weeks	Stable –	Stable –	
Capacitors Tantalum Polymer	Kemet/Yageo	18 - 47 weeks	Up ▲	Stable –	
	Kyocera AVX	14 -26 weeks	Up ▲	Stable –	
	Vishay	14 - 26 weeks	Up ▲	Stable –	
Military Ceramics (M123, M49470, leaded)	Kemet/Yageo	12 - 36 weeks	Stable –	Stable –	
	Kyocera AVX	12 - 36 weeks	Stable –	Stable –	
	Vishay	10 - 45 weeks	Stable –	Stable –	
Military Tantalums (M39003, M9006, CWR)	Kemet/Yageo	16 - 24 weeks	Stable –	Stable –	
	Kyocera AVX	11 - 26 weeks	Stable –	Stable –	
	Vishay	16 - 52 weeks	Stable –	Stable –	
Military Resistors (M55342)	Vishay	46 - 71 weeks	Up ▲	Stable –	

PEMCO MARKET TRENDS

Interconnect

Future Lead Times	Stable
Price	Stable, Going Up

Low demand is contributing to price and lead time stabilization. Rising geopolitical tension impacts some suppliers with raw material shortages, which will cause price increases over the first half of 1H25. The average lead is around 12 - 20 weeks.

Amphenol and **TE Connectivity's** interconnect products will see prices remain high during 1Q25 but stabilize into the latter half of 1H25.

ITT will see price trends increase over 1Q25 on all its interconnect product lines.

Conesys and **Glenair's Circular** products will see prices increase over 1Q25.

Glenair's D-shaped products will see prices trend up during 1Q25.

Samtec's interconnect product lines will see price trends decline over 1Q25.

PEMCO MARKET TRENDS

Interconnect

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE	COMMENTS
		CURRENT	FUTURE TREND (NEXT 3 MONTHS)	FUTURE TREND (NEXT 3 MONTHS)	
Backplane	Amphenol	6 - 14 weeks	Stable –	Stable –	Current prices are trending up through Q1.
	ITT	14 - 20 weeks	Stable –	Up ▲	
	Molex	12 - 16 weeks	Stable –	Stable –	
	TE Connectivity	12 - 18 weeks	Stable –	Stable –	Current prices are trending up through Q1.
Circular	Amphenol	12 - 20 weeks	Stable –	Stable –	Current prices are trending up through Q1.
	Conesys	10 - 18 weeks	Stable –	Up ▲	
	Glenair	2 - 4 weeks	Stable –	Up ▲	
	ITT	18 - 34 weeks	Stable –	Up ▲	
	ODU	8 - 12 weeks	Stable –	Stable –	
	TE Connectivity	15 - 21 weeks	Stable –	Stable –	Current prices are trending up through Q1.
D-Shaped	Amphenol	8 - 12 weeks	Stable –	Stable –	Current prices are trending up through Q1.
	Glenair	2 - 4 weeks	Stable –	Up ▲	
	ITT	20 - 26 weeks	Stable –	Up ▲	
	TE Connectivity	12 - 20 weeks	Stable –	Stable –	Current prices are trending up through Q1.
I/O	Amphenol	8 - 12 weeks	Stable –	Stable –	Current prices are trending up through Q1.
	Molex	12 - 18 weeks	Stable –	Stable –	
	TE Connectivity	9 - 15 weeks	Stable –	Stable –	Current prices are trending up through Q1.
Power	Amphenol	6 - 12 weeks	Stable –	Stable –	Current prices are trending up through Q1.
	Molex	12 - 20 weeks	Stable –	Stable –	
	Samtec	3 - 8 weeks	Stable –	Down ▼	
	TE Connectivity	12 - 20 weeks	Stable –	Stable –	Current prices are trending up through Q1.
Terminal Block	Amphenol	6 - 12 weeks	Stable –	Stable –	Current prices are trending up through Q1.
	Molex	10 - 16 weeks	Stable –	Stable –	
	TE Connectivity	10 - 18 weeks	Stable –	Stable –	Current prices are trending up through Q1.

PEMCO MARKET TRENDS

Interconnect

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE	COMMENTS
		CURRENT	FUTURE TREND (NEXT 3 MONTHS)	FUTURE TREND (NEXT 3 MONTHS)	
Discrete Housing	Amphenol	8 - 14 weeks	Stable –	Stable –	Current prices are trending up through Q1.
	Molex	11 - 17 weeks	Stable –	Stable –	
	Samtec	4 - 8 weeks	Stable –	Down ▼	
	TE Connectivity	12 - 18 weeks	Stable –	Stable –	Current prices are trending up through Q1.
PC Board	Amphenol	6 - 16 weeks	Stable –	Stable –	Current prices are trending up through Q1.
	ITT	18 - 20 weeks	Stable –	Up ▲	
	Molex	12 - 20 weeks	Stable –	Stable –	
	Samtec	1 - 6 weeks	Stable –	Down ▼	
	TE Connectivity	12 - 20 weeks	Stable –	Stable –	Current prices are trending up through Q1.
Cable Assemblies	Amphenol	12 - 20 weeks	Stable –	Stable –	Current prices are trending up through Q1.
	Glenair	2 - 4 weeks	Stable –	Up ▲	
	ITT	18 - 20 weeks	Stable –	Up ▲	
	Molex	12 - 20 weeks	Stable –	Stable –	
	Samtec	3 - 8 weeks	Stable –	Down ▼	
	TE Connectivity	14 - 20 weeks	Stable –	Stable –	Current prices are trending up through Q1.
	Amphenol	12 - 16 weeks	Stable –	Stable –	Current prices are trending up through Q1.
	Glenair	2 - 4 weeks	Stable –	Up ▲	
Connector Accessories	ITT	12 - 16 weeks	Stable –	Up ▲	
	Molex	11 - 17 weeks	Stable –	Stable –	
	ODU	8 - 12 weeks	Stable –	Stable –	
	TE Connectivity	11 - 19 weeks	Stable –	Stable –	Current prices are trending up through Q1.
Connector Contacts	Amphenol	12 - 18 weeks	Stable –	Stable –	Current prices are trending up through Q1.
	Carlisle	10 - 14 weeks	Stable –	Stable –	
	ITT	18 - 20 weeks	Stable –	Up ▲	
	Molex	12 - 16 weeks	Stable –	Stable –	
	TE Connectivity	12 - 20 weeks	Stable –	Stable –	Current prices are trending up through Q1.

PEMCO MARKET TRENDS

Electro-Mechanical

Future Lead Times Going Up

Price Up

Rising geopolitical tension has increased lead times and prices across suppliers in the power product sector. As the U.S.-China trade continues, this trend will likely continue through 1H25. The average lead time is around 32 weeks.

Ebm-papst thermal products are seeing their lead times increase.

Prices and lead times for power products from **ABB, Artesyn, Bel, Mean Well, Murata, TDK,** and **Lambda** will increase through Q1.

TECHNOLOGY	SUPPLIER	LEAD TIME		PRICE	COMMENTS
		CURRENT	FUTURE TREND (NEXT 3 MONTHS)	FUTURE TREND (NEXT 3 MONTHS)	
Thermal	ebm-papst	15 - 20 weeks	Up ▲	Stable –	Lead times trending up through Q1.
Frequency Control (Oscillators, MEMS, KHZ, Watch crystal)	Abracon	12 - 26 weeks	Stable –	Stable –	
	ECS	12 - 26 weeks	Stable –	Stable –	
Switch Relays	OMRON	14 weeks	Stable –	Stable –	
Power (AC/DC, DC/DC)	ABB	32 weeks	Up ▲	Up ▲	Lead times and price trending up through Q1.
	Artesyn	32 weeks	Up ▲	Up ▲	Lead times and price trending up through Q1.
	Bel	32 weeks	Up ▲	Up ▲	Lead times and price trending up through Q1.
	MEAN WELL	32 weeks	Up ▲	Up ▲	Lead times and price trending up through Q1.
	Murata	32 weeks	Up ▲	Up ▲	Lead times and price trending up through Q1.
	TDK	32 weeks	Up ▲	Up ▲	Lead times and price trending up through Q1.
	Lambda	32 weeks	Up ▲	Up ▲	Lead times and price trending up through Q1.

Final Thoughts

The fourth quarter of 2024 was quiet compared to the hectic whirlwind of black swan events seen in Q3.

While the semiconductor sector continued to stabilize, buoyed by excess inventory and tempered demand, the passive component market faced significant challenges from geopolitical tensions that led to resource constraints. These scenarios highlight the importance of a nuanced approach to procurement and supply chain management in the electronic components industry.

The current environment offers an opportunity to refine inventory strategies and capitalize on steady pricing and lead times. Vigilance will be required through 1H25 to monitor potential shifts in demand or inventory dynamics that could reignite volatility. Donald Trump's incoming term in the U.S. could lead to prices increasing as a side effect of growing tariffs and policy changes.

Likewise, the rippling effects of China's material restrictions demand proactive measures. Diversifying supplier bases, exploring alternative materials, and closely monitoring geopolitical developments will be crucial for mitigating risks and maintaining continuity in production.

As we continue through 1Q2025, the interplay between global economic conditions, geopolitical developments, and technological advancements will continue to shape the electronic components market.

By leveraging these insights, industry professionals can better anticipate and adapt to emerging challenges and opportunities, positioning themselves for success in an increasingly complex landscape.

Q4 2024 Lead Time Report

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