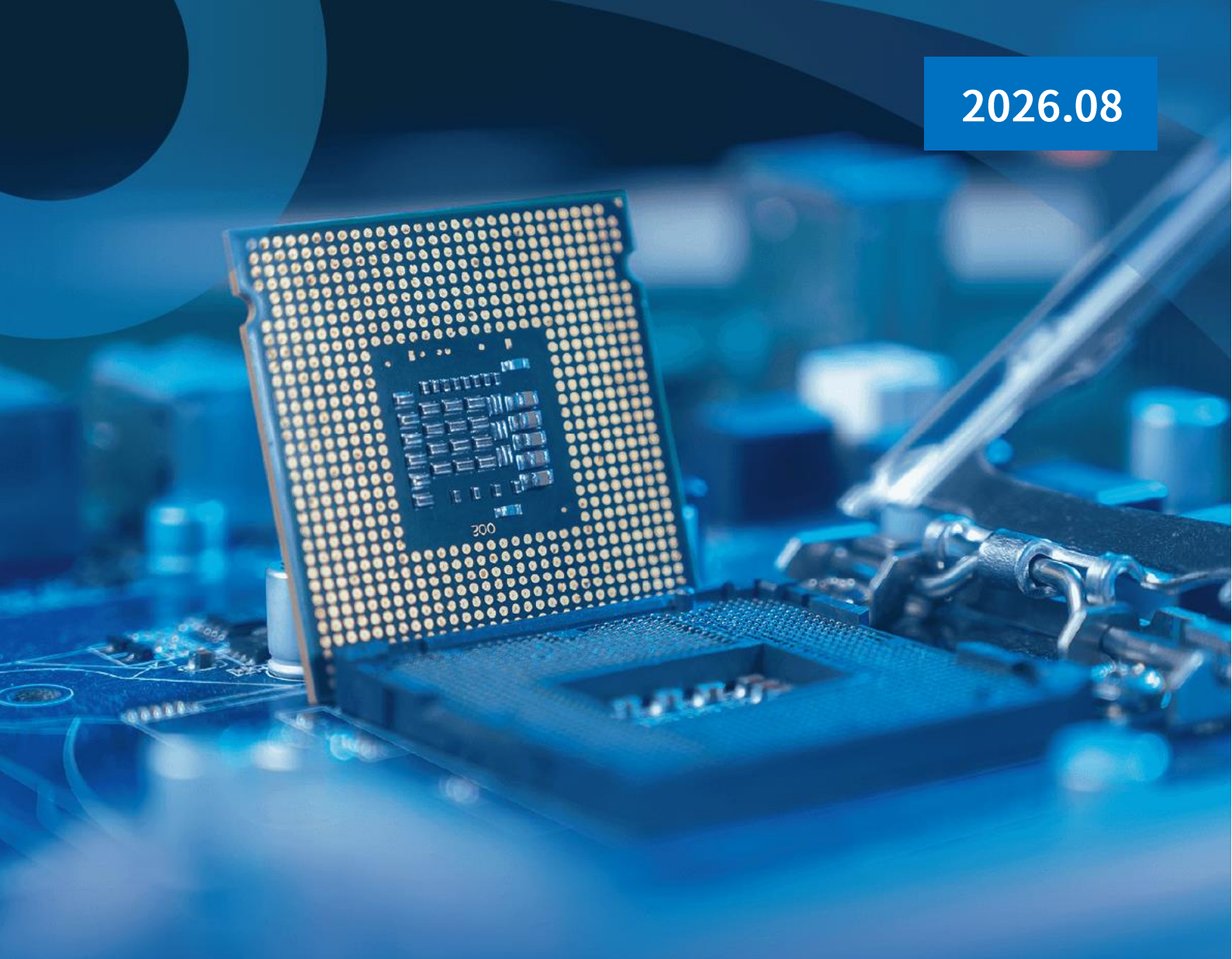


2026.08



Electronic Components Sales Market Analysis and Forecast

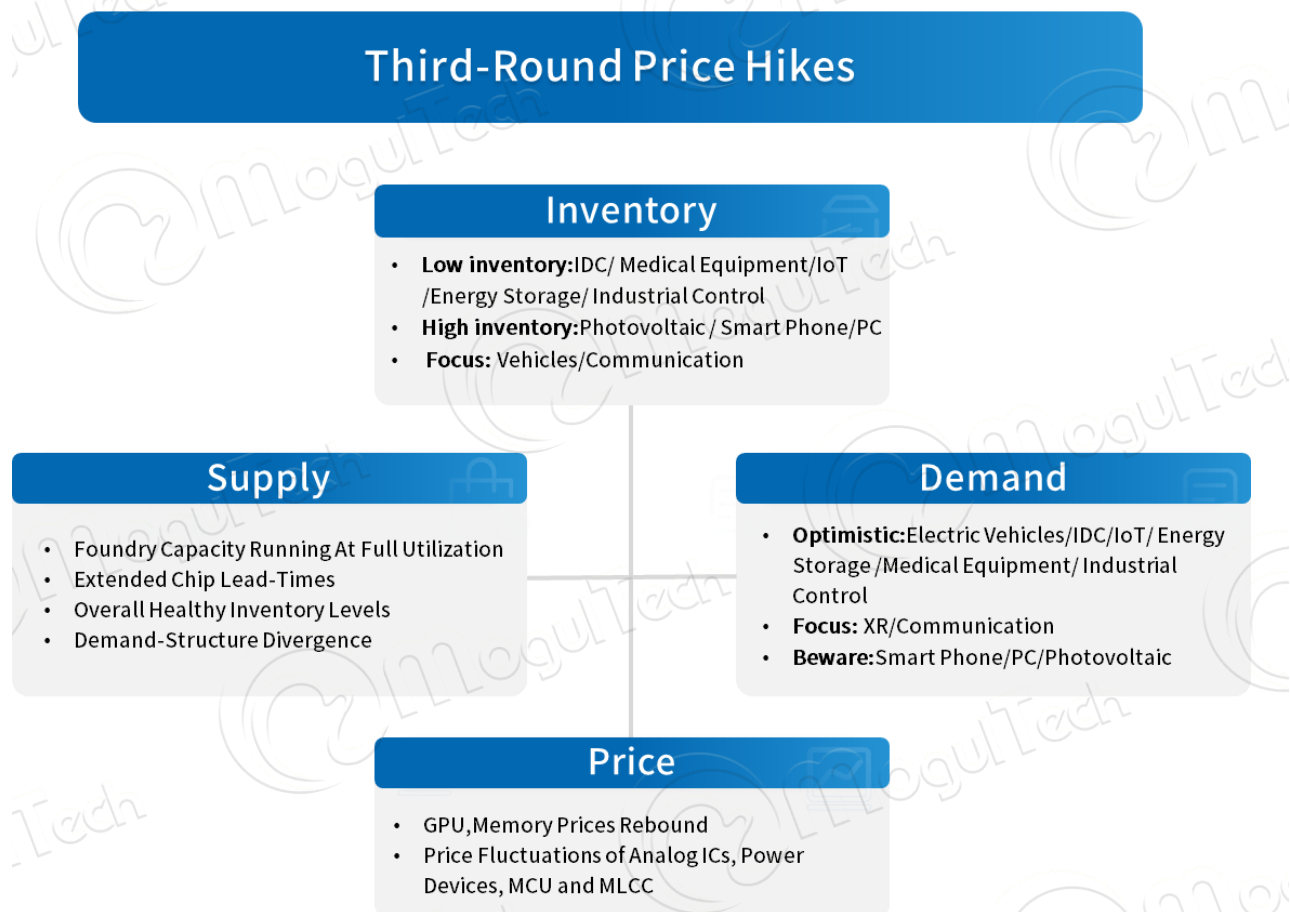
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Prologue



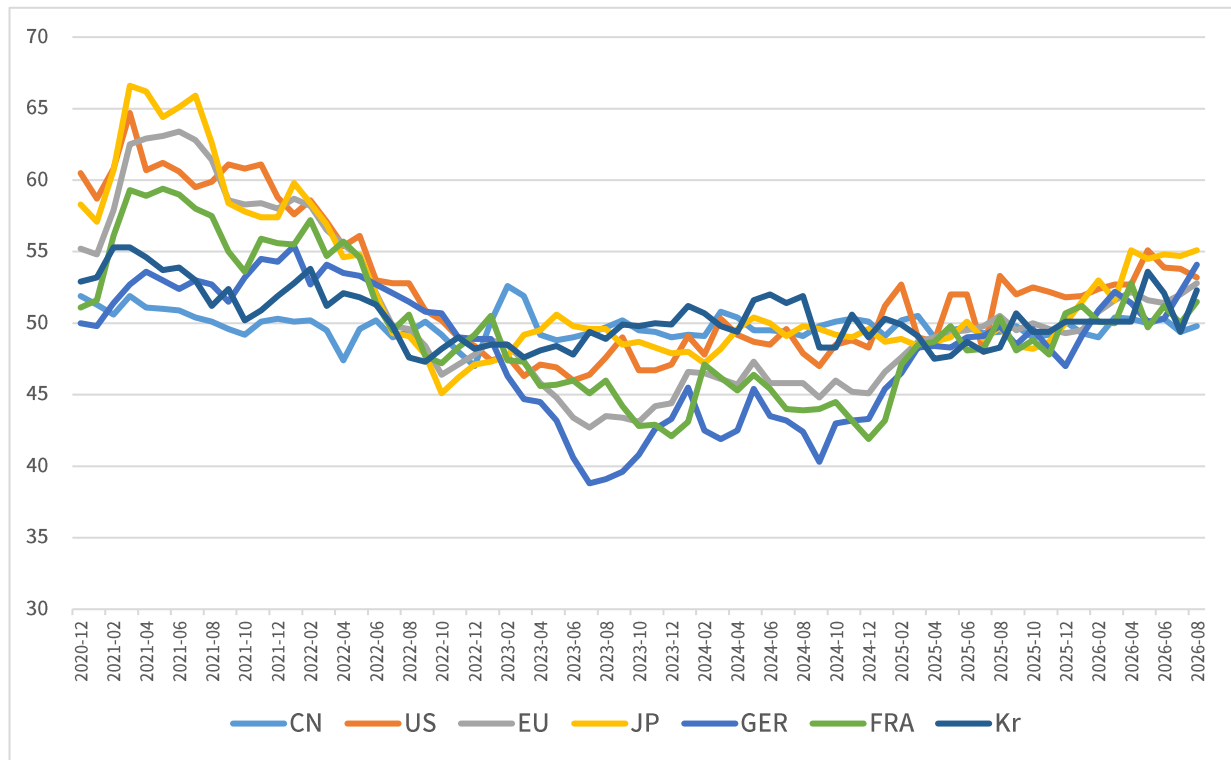
1 Macroeconomic Overview

1.1 Global Manufacturing Shows Signs Of Recovery With Sustained Marginal Improvement

In August, the global manufacturing PMI rose to 52.3, staying above the boom-bust line for the 13th consecutive month. Output, new orders and employment metrics improved simultaneously. Japan (55.1) and Germany (54.1) led the upturn. U.S. manufacturing slipped, while its services sector hit a 52-month high. China (49.8) remained in contraction for five straight

months yet saw marginal improvement. Germany posted robust recovery within Europe, and the AI computing-power chain acts as the core driving force behind global manufacturing rebound.

Figure 1: Manufacturing PMI of Major Global Economies

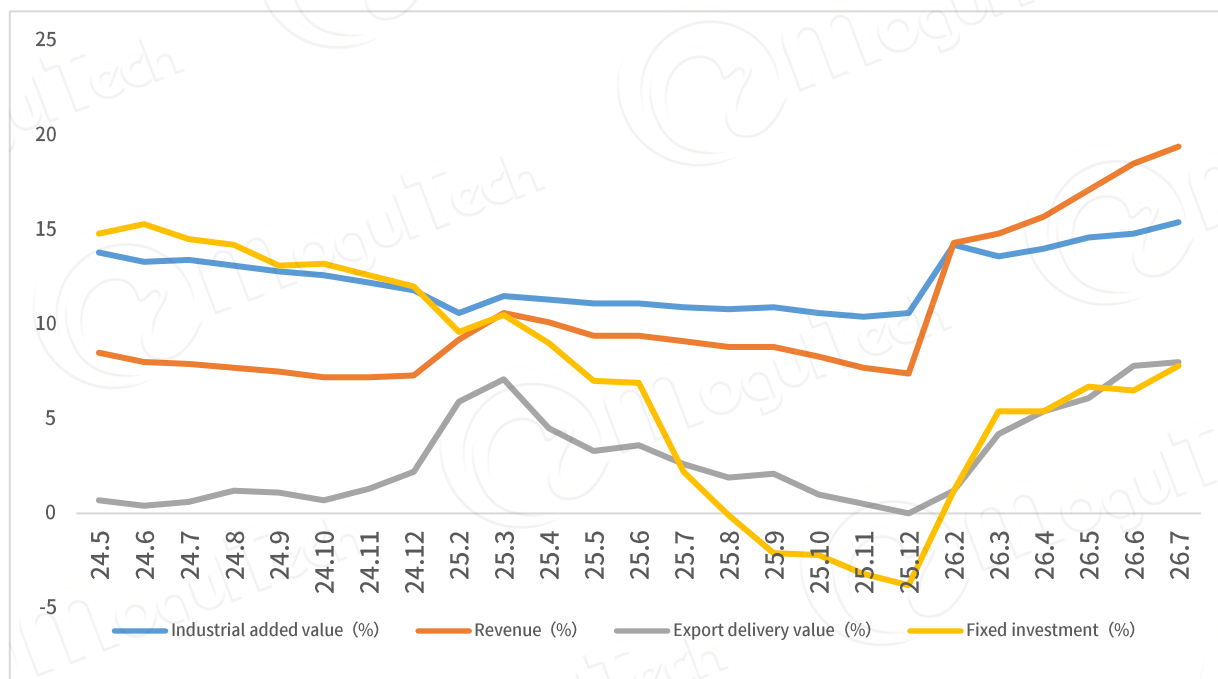


Source: NBSPRC

1.2 Electronic Information Manufacturing Sees Surge in Profitability And Rising Investment

From January to July 2026, China's electronic information manufacturing industry maintained rapid production growth. Export growth climbed steadily, industry profitability expanded sharply and investment picked up markedly, pointing to sound overall industry momentum.

Figure 2: Latest Operation of Electronic Information Manufacturing Industry



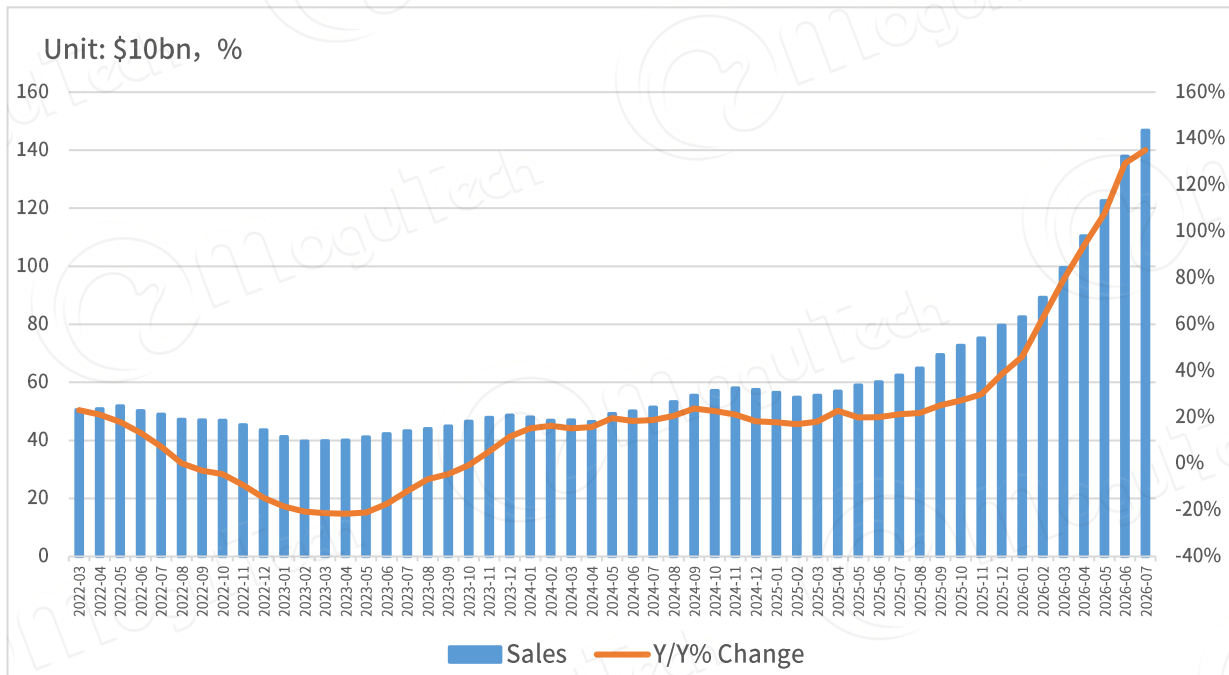
Source: MIIT

1.3 Semiconductor Sales Maintain Strong Growth And Hit Fresh All-Time Highs

Per the latest SIA statistics, global semiconductor market sales reached USD 146.80 billion in July, surging 135.1% year-on-year. It marked the 17th consecutive month of quarter-on-quarter growth, and cumulative sales over the first seven months set an all-time record for any year.

By regional market, the Americas posted 171.3% YoY growth, China registered 123.6% YoY growth. Sales in Asia-Pacific, Japan and Europe rose 134.9%, 50.8% and 85.2% respectively. The Americas, Asia-Pacific and China drove global market expansion.

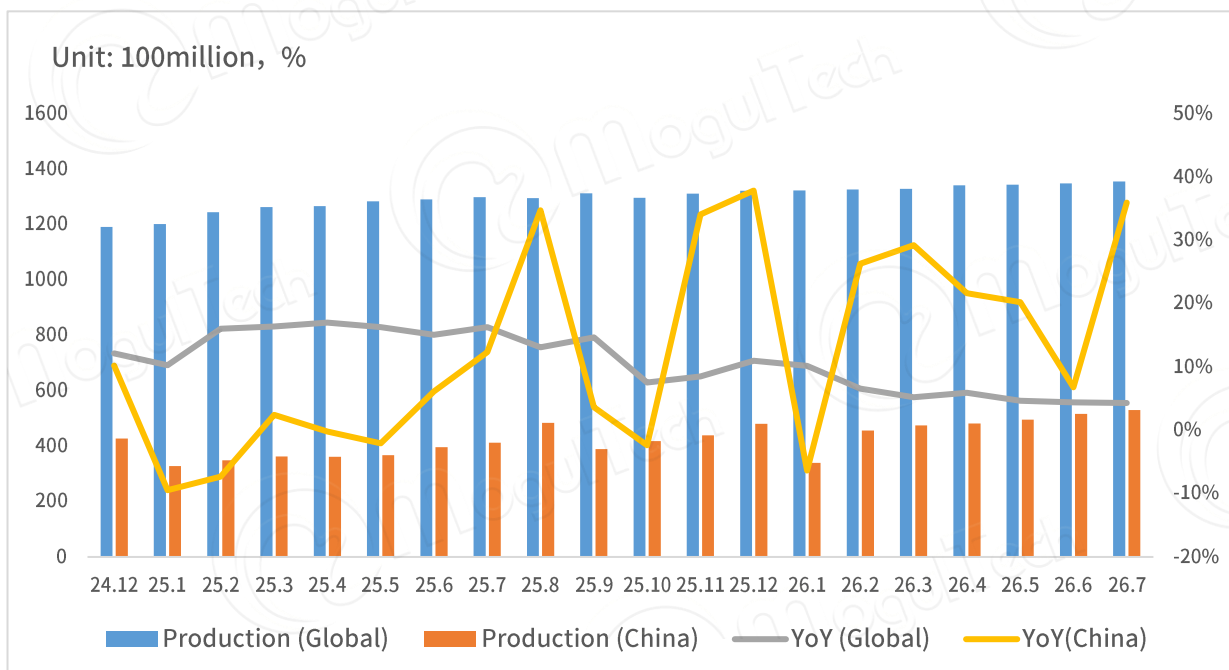
Figure 3: Global Semiconductor Industry Sales And Growth Rate



Source: SIA, Chip Insights

In terms of IC output, global and China's integrated-circuit output exceeded 135.5 billion units and 52.9 billion units respectively in July.

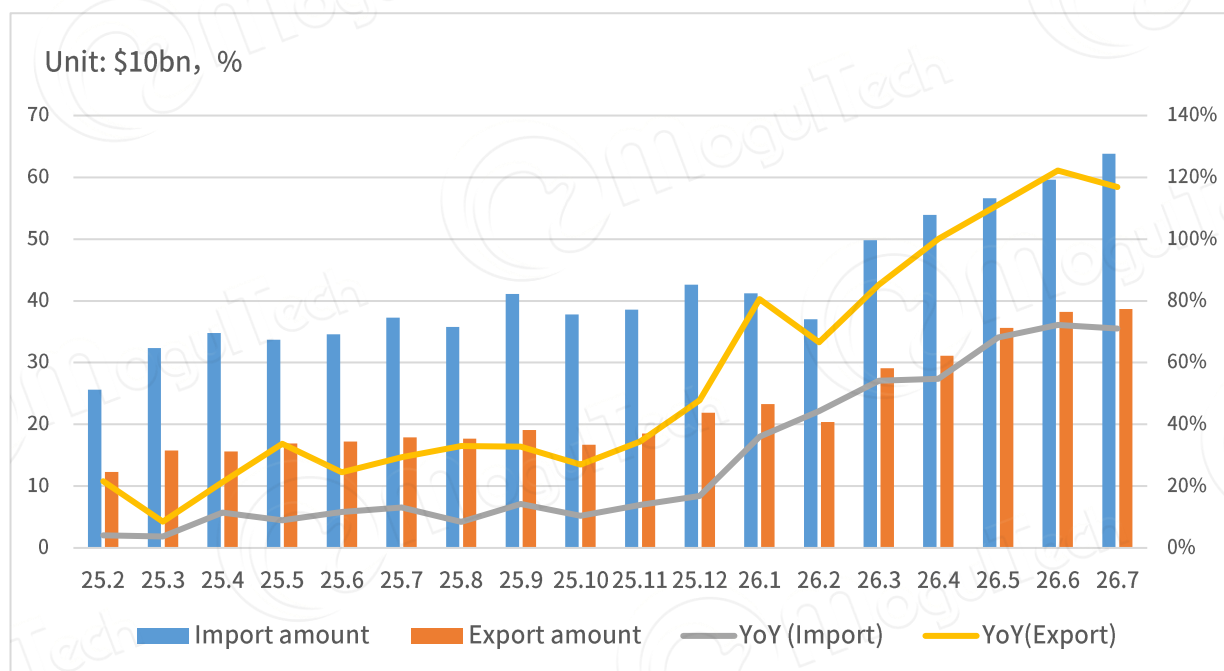
Figure 4: Global And China Integrated-Circuit Output And Growth Rate



Source: WSTS,SIA,Chip Insights

On import-export front, China's IC trade stayed robust in July, with export growth exceeding 111% for three successive months.

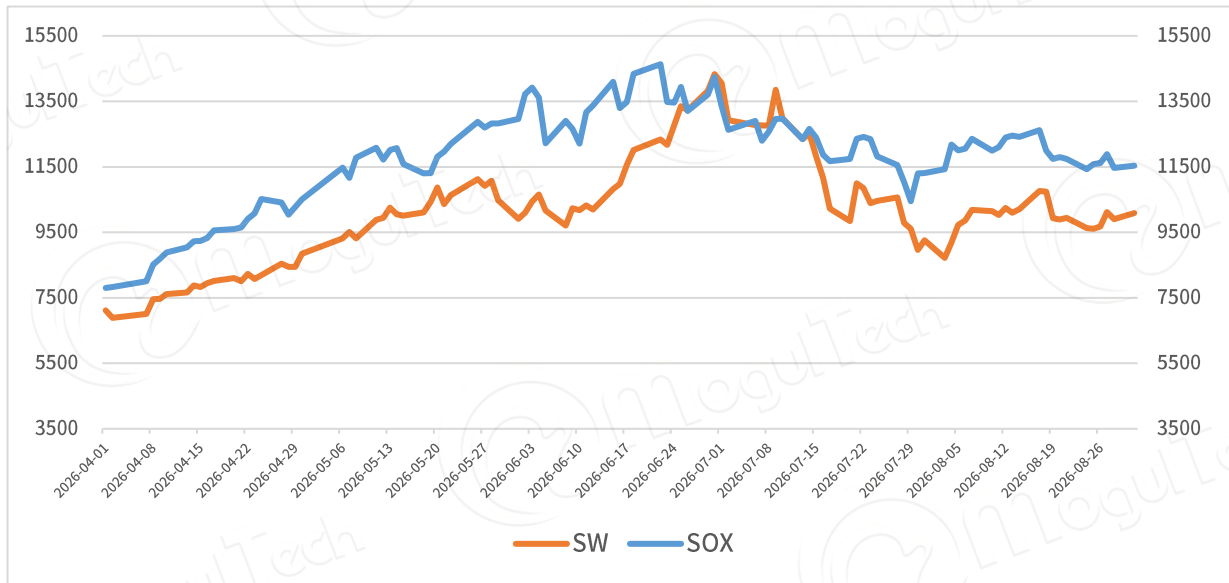
Figure 5: China Integrated-Circuit Import & Export Value And Growth Rate



Source: MIIT,SIA,Chip Insights

For capital-market indices, fueled by AI computing-power demand and earnings validation during reporting season, the Philadelphia Semiconductor Index (SOX) climbed 0.9%, while the China Semiconductor (SW) Index advanced 15.7%.

Figure 6: Trend of SOX and SW Index in August



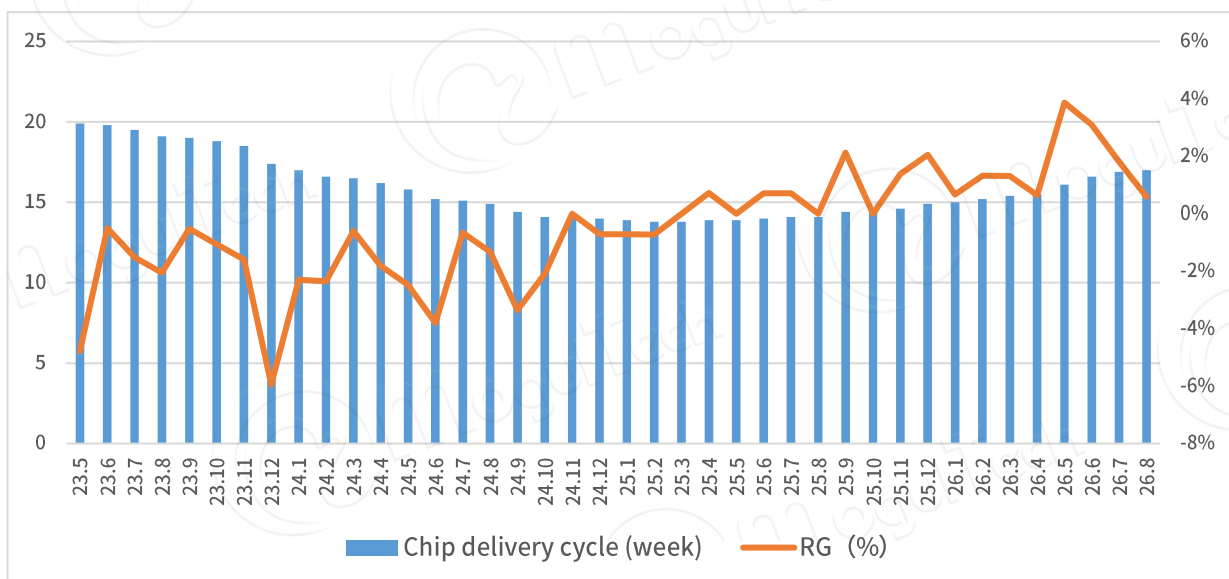
Source: Wind, Chip Insights

2 Chip Lead-Time Trends

2.1 Overall Chip Lead-Time Trends

In August, component lead-times rose for 10 consecutive months, with extended delivery cycles for flagship vendors and hot-selling parts.

Figure 7: Chip Lead-Time Trend



2.2 Lead-Time Snapshot Of Key Chip Suppliers

August witnessed the third-round price-hike wave across the semiconductor sector. AI-related memory remained in tight supply. Pricing and lead-times for power devices, MCUs, analog chips, FPGAs and passive components kept moving higher, and spot-market price increases spread broadly.

Figure 8: Lead-Time And Trend Snapshot Of Major Vendors

Category	Supplier	Product	26.8 delivery /week	26.9 delivery/ week	Delivery trend	Price trend
Analog	TI	Multi-source analog/power	16-30	16-30	Extend	Rise
		Signal Chain	16-24	16-24	Extend	Rise
	AMS OSRAM	Sensor	16-40	16-40	Extend	Rise
	Bosch	Sensor	16-52	16-52	Extend	Stablize
	Diodes	Multi-source analog/power	18-40	18-40	Extend	Rise
		Switching regulator	20-24	20-24	Extend	Rise
	FTDI Chip	Interface	30-34	30-34	Extend	Stablize
	Infineon	Sensor	4-60	4-60	Extend	Rise
		Switching regulator	24-30	24-30	Extend	Rise

Category	Supplier	Product	26.8 delivery /week	26.9 delivery/ week	Delivery trend	Price trend
	ADI	Automotive Simulation and Power	24-30	24-30	Extend	Rise
		Signal Chain	26-40	26-40	Extend	Rise
		Interface	26-40	26-40	Extend	Rise
		Switching regulator	26-40	26-40	Extend	Rise
	Microchip	Signal Chain	4-10	4-10	Stablize	Rise
		Timing chip	7-12	7-12	Stablize	Rise
		Switching regulator	8-16	8-16	Stablize	Rise
	MPS	Switching regulator	24-46	24-46	Extend	Rise
	NXP	Sensor	16-52	16-52	Stablize	Stablize
		Interface	16-20	16-20	Stablize	Rise
		Automotive Simulation and Power	22-24	22-24	Stablize	Rise
		Sensor	18-52	18-52	Extend	Rise
	onsemi	Signal Chain	10-16	10-16	Stablize	Rise
		Timing chip	22-32	22-32	Extend	Rise
		Multi- source	14-26	14-26	Extend	Rise

Category	Supplier	Product	26.8 delivery /week	26.9 delivery/ week	Delivery trend	Price trend
		analog/power				
		Switching regulator	12-22	12-22	Extend	Rise
	Panasonic	Sensor	16-26	16-26	Extend	Rise
	Renesas	Signal Chain	14-16	14-16	Extend	Rise
		Timing chip	20-26	20-26	Extend	Rise
		Interface	12-14	12-14	Extend	Rise
		Switching regulator	18-36	18-36	Extend	Rise
	ROHM	Sensor	24-52	24-52	Extend	Rise
		Switching regulator	16-26	16-26	Stablize	Stablize
	ST	Sensor	24-52	24-52	Extend	Rise
		Signal Chain	20-22	20-22	Extend	Rise
		Multi-source analog/power	18-26	18-26	Extend	Rise
		Switching regulator	18-26	18-26	Extend	Rise
		Automotive Simulation and Power	18-30	18-30	Extend	Rise
	TE	Sensor	16-52	16-52	Extend	Rise

Category	Supplier	Product	26.8 delivery /week	26.9 delivery/ week	Delivery trend	Price trend
	Vishay	Sensor	24-52	24-52	Stablize	Stablize
RF and wireless	Infineon	Bluetooth module	16-24	16-24	Stablize	Rise
	Microchip	WiFi module	12-20	12-20	Stablize	Stablizess
		Bluetooth module	12-20	12-20	Stablize	Stablizess
		Transceiver/Receiver	12-20	12-20	Stablize	Stablizess
	Murata	WiFi module	26-50	26-50	Extend	Stablize
		Bluetooth module	26-50	26-50	Extend	Stablize
	Laird	WiFi module	16-30	16-30	Stablize	Stablize
		Antenna Products	12-16	12-16	Stablize	Stablize
	ST	Bluetooth module	52	52	Extend	Rise
		Transceiver/Receiver	30	30	Extend	Rise
		RFID	20	20	Extend	Rise
	NXP	Transceiver/Receiver	24	24	Stablize	Rise
		RFID	13	13	Stablize	Rise
		High power IC	12-16	12-16	Stablize	Rise
	onsemi	Bluetooth module	16-30	16-30	Stablize	Stablize

Category	Supplier	Product	26.8 delivery /week	26.9 delivery/ week	Delivery trend	Price trend
Discrete	Diodes	Low Voltage MOSFETs	12-52	12-52	Extend	Rise
		TVS diode	16-40	16-40	Extend	Rise
		Bridge Rectifier	16-20	16-20	Extend	Rise
		Schottky diodes	20-50	20-50	Extend	Rise
		Rectifier	24-30	24-30	Extend	Rise
		Switching diodes	20-50	20-50	Extend	Rise
		Small Signal MOSFETs	20-50	20-50	Extend	Rise
		Zener diode	20-50	20-50	Extend	Rise
		Bipolar transistor	20-50	20-50	Extend	Rise
		Digital Transistor/ RETS	20-50	20-50	Extend	Rise
		General purpose transistor	20-50	20-50	Extend	Rise
		logic device	8-44	8-44	Extend	Rise
	Infineon	Low Voltage MOSFETs	12-52	12-52	Extend	Rise
		HV MOSFETs	12-52	12-52	Extend	Rise

Category	Supplier	Product	26.8 delivery /week	26.9 delivery/ week	Delivery trend	Price trend
		IGBT	12-52	12-52	Extend	Rise
		Wide Bandgap MOSFETs	12-52	12-52	Stablize	Rise
		Digital Transistor/ RETS	30-52	30-52	Extend	Rise
		general purpose transistor	30-52	30-52	Extend	Rise
		Military- Aerospace Transistors	16-24	16-24	Extend	Rise
	ST	Low Voltage MOSFETs	10-23	10-23	Extend	Rise
		HV MOSFETs	12-26	12-26	Extend	Rise
		IGBT	14-24	14-24	Extend	Stablize
		ESD	16-24	16-24	Extend	Stablize
		Wide Bandgap MOSFETs	20-32	20-32	Extend	Stablize
		Thyristor/T riac	15-20	15-20	Stablize	Stablize
		TVS diode	12-16	12-16	Stablize	Stablize
		Rectifier	18-20	18-20	Extend	Rise
		Bipolar transistor	22-36	22-36	Extend	Stablize

Category	Supplier	Product	26.8 delivery /week	26.9 delivery/ week	Delivery trend	Price trend
	Wingtech (Nexperia)	Low Voltage MOSFETs	13-52	13-52	Extend	Rise
		ESD	52	52	Extend	Rise
		Schottky diodes	16-52	16-52	Extend	Rise
		Switching diodes	16-52	16-52	Extend	Rise
		Small Signal MOSFETs	16-52	16-52	Extend	Rise
		Zener diode	16-52	16-52	Extend	Rise
		Bipolar transistor	16-52	16-52	Extend	Rise
		RETS	16-52	16-52	Extend	Rise
		General purpose transistor	16-52	16-52	Extend	Rise
		logic device	8-24	8-24	Shorten	Rise
MCU	Renesas	8-bit MCU	18	18	Extend	Stablize
		32-bit MCU	18	18	Extend	Stablize
		Car	24	24	Stablize	Stablize
		32-bit MPU	12	12	Stablize	Stablize
	ST	8-bit MCU	40-52	40-52	Extend	Rise
		Automotive	40-52	40-52	Stablize	Stablize

Category	Supplier	Product	26.8 delivery /week	26.9 delivery/ week	Delivery trend	Price trend
	Infineon	32-bit MCU	40-52	40-52	Extend	Stablize
		8-bit MCU	10-26	10-26	Stablize	Rise
		32-bit MCU	10-97	10-97	Extend	Rise
		Automotive	32-45	32-45	Stablize	Stablize
	Microchip	8-bit MCU	4-12	4-12	Stablize	Rise
		32-bit MCU	4-18	4-18	Extend	Rise
		32-bit MPU	4-20	4-20	Stablize	Rise
	NXP	8-bit MCU	16-39	16-39	Stablize	Rise
		32-bit MCU	16-39	16-39	Stablize	Rise
		Automotive	18-52	18-52	Stablize	Rise
		32-bit MPU	18-52	18-52	Extend	Rise
PLD	AMD (Xilinx)	FPGA	18-30	18-30	Stablize	Rise
	Intel (Altera)		14-30	14-30	Stablize	Stablize
	Lattice		12-36	12-36	Stablize	Stablize
	Microchip (Microsemi)		12-30	12-30	Extend	Rise
Memory	Infineon	SRAM	12-52	12-52	Extend	Stablize
		NOR flash	20-26	20-26	Extend	Rise
	GigaDevice	NOR flash	16-26	16-26	Extend	Rise
		NAND flash	16-26	16-26	Extend	Rise

Category	Supplier	Product	26.8 delivery /week	26.9 delivery/ week	Delivery trend	Price trend
	Micron	DRAM	26-52	26-52	Extend	Rise
		eMMC	26-52	26-52	Extend	Rise
	SK Hynix	NAND flash	52+	52+	Extend	Rise
		eMMC	52+	52+	Extend	Rise
Passive components	Murata	Filter	24-30	24-30	Extend	Rise
		Inductor/T ransformer	8-12	8-12	Stablize	Rise
		Leaded Ceramic Capacitors	26-30	26-30	Extend	Stablize
		Dedicated Capacitor	20-26	20-26	Extend	Stablize
	TDK	Filter	24-26	24-26	Extend	Rise
		Inductor/T ransformer	16-20	16-20	Stablize	Rise
		Surface Mount General Purpose Ceramic Capacitor(Automotive Grade)	24-26	24-26	Extend	Stablize

Source: Future Electronics, Wind, Chip Insights

3 Order And Inventory Conditions

Looking ahead to September, AI-related orders will sustain robust growth. Volatility in consumer and automotive orders merits close attention.

Figure 9: Order And Inventory Status Of Leading Enterprises

Company	26.8 Orders	26.8 Inventory	26.9 Orders Trend
Intel	Rise	Low	Rise
AMD	Rise	Low	Rise
NVIDIA	Rise	None	Rise
Samsung	Rise	Low	Rise
TI	Rise	Higer	Rise
ST	Rise	Generally	Rise
ADI	Rise	Generally	Rise
Qualcomm	Rise	Generally	Rise
Broadcom	Rise	Low	Rise
NXP	Rise	Generally	Rise
Infineon	Rise	Generally	Rise
Renesas	Rise	Low	Rise
onsemi	Rise	Low	Rise
Microchip	Rise	Generally	Rise
Micron	Rise	Low	Rise
SK Hynix	Rise	Low	Rise
Murata	Rise	Low	Rise
MTK	Rise	Low	Rise

Inventory status: higer>high > generally/Stable > low > lower > none

Source: Chip Insights

4 Semiconductor Supply Chain

Equipment and material orders are on the rise. Foundry capacity shows

divergent trends, while Fabless/IDM vendor orders pull back and end-user demand stays stable.

4.1 Upstream Semiconductor Players

(1) Silicon Wafers & Equipment

Orders for equipment and materials are running at full capacity, with lead-times continuously stretching out.

Figure 10: Order Status Of Leading Semiconductor Equipment And Silicon

Wafer Players

Type	Company	26.8 Orders	26.8 Inventory	26.9 Orders Trend
Equipment	ASML	Rise	Low	Rise
	AMAT	Rise	Low	Rise
	LAM	Rise	Low	Rise
	TEL	Rise	Low	Rise
	KLA	Rise	Low	Rise
	NAURA	Rise	Low	Rise
	AMEC	Rise	Low	Rise
	SiCarrier	Rise	Low	Rise
Silicon wafer	ShinEtsu	Rise	Generally	Rise

Type	Company	26.8 Orders	26.8 Inventory	26.9 Orders Trend
	Sumco	Rise	Generally	Rise
	Global Wafer	Rise	Generally	Rise
	Tai Win	Rise	Generally	Rise
	WAFER WORKS	Rise	Generally	Rise
	NSIG	Rise	Low	Rise

Source: Chip Insights

(2) Fabless/IDM

Demand for computing-power chips consistently beats expectations. Price-hike cycles persist for analog chips, MCUs and MLCCs.

Figure 11: Latest Updates of Major Fabless/IDMs

Company	News in 26.8
Intel	Server cpu demand hit record high in 2026 Q2
AMD	CPU supply remains tight.more production capacity is expected to be released in 2027
NVIDIA	AI-related products witness price hikes of over 15%.initial H200 deliveries made to ByteDance and Tencent.orders for Vera CPU opened for China market
TI	All markets are projected to maintain strong momentum in 2026 Q3
Qualcomm	Dragonfly C1000 server CPU to be launched in H2 2028.Meta serves as the first customer
Samsung	DRAM production expansion in the second half of the year may fall below expectations.HBM4 yield jumps above 80%

Company	News in 26.8
MTK	R&D progress of 400G/448Gbps SerDes proceeds smoothly.readiness expected in H2 2027
Broadcom	Fiscal-year 2026 revenue guidance for AI business raised from USD 56 billion to USD 58 billion, representing 186% year-on-year growth
ADI	The second-round price hike will take effect on Sep 13th
ST	The third-round price hike of the year implemented starting from Aug 23rd
Infineon	Acquired india-based data-center-related vendor C2i Semiconductors
NXP	Planned acquisition of U.S. firm Ambarella to strengthen layout in SDV, radar and electrification businesses
onsemi	AI data-center business stands as the fastest-growing segment
Renesas	Bill-of-materials coverage for humanoid robots has reached approximately 30%, with potential to expand to 70%
Microchip	Total data-center sales are estimated at roughly USD 1 billion in 2026 (+69% YoY)
SK Hynix	Plans to boost domestic NAND flash capacity in China by 50%.will invest USD 38.4 billion to expand chip business in South Korea
Micron	Large-scale equipment investment planned before year-end to scale up production capacity for new-generation HBM
Seagate	This year' s production capacity is fully sold out.some key customers have pre-booked supply allocations as early as 2029
WD	High-bandwidth hard drives tailored for AI have started sample deliveries
Marvell	Q3 data-center revenue projected at USD 3.15 billion (+5% YoY)
Wolfspeed	AI data-center revenue set to double in fiscal year 2026
Murata	Current total monthly output stands at 160 billion units.monthly output of high-capacitance products (105 and above) reaches 50 billion units, accounting for 30% of total capacity
Rapidus	R&D on 1.4nm manufacturing process launched in 2026.mass production scheduled for 2029

Company	News in 26.8
SEMCO	OEM/ODM clients raise Q4 2026 MLCC quotations.consumer-grade X5R average price increased by 25%-30%.premium X6S for AI servers subject to customer negotiation
Taiyo Yuden	Upgraded financial forecast, accelerated capacity expansion and increased capital expenditure
KIOXIA	Planned NAND flash capacity expansion investment of 5 trillion yen through 2032.additional over USD 31 billion investment with SanDisk joint venture till 2032
Macronix	Monthly 12-inch wafer capacity target raised from 25,000 wafers to over 30,000 wafers
YAGEO	Robust MLCC demand.customers bid higher to secure component supply
NANYA	2026 capital expenditure raised from 52 billion to 69.7 billion new taiwan dollars (+34% YoY)
Winbond	Monthly output of kaohsiung 16nm DRAM Module-A increased from 15,000 wafers to 24,000 wafers
Wingtech	H1 revenue reached RMB 1.514 billion (-94.02% YoY)
OmniVision	OmniVision' s CIS market share rose to no.2 globally in 2026 Q2
GD	Full-year DRAM foundry service procurement of approximately RMB 5.7 billion expected
CXMT	HBM3E under trial production.LPDDR6 entered mass production.global DRAM tight supply will continue in H2 2026
YMTC	Company' s NAND flash shipment share hit 14% in Q2 2026, entering global top-three for the first time
Longsys	H1 revenue hit RMB 24.088 billion (+136.26% YoY).net profit attributable to parent company reached RMB 10.577 billion (+71529% YoY)
Ingenic	DRAM prices keep rising in 2026 Q3, while flash has not seen comprehensive price hikes
Cmsemicon	Completed investment closing for Zhuhai Boya (NOR Flash) with RMB 166 million capital contribution

Source: Chip Insights

(3) Foundrys

Capacity utilization holds steady at high levels, order backlogs remain solid and price-hike expectations are clear.

Figure 12: Latest Updates of Major Foundries

Company	CU in 26.8	News in 26.8	26.9 Order Forecast
TSMC	98%-100%	A16 process completes development and verification, targeting mass production in Q4	Rise
Samsung	80%-90%	Expected to achieve 100% capacity utilization within the second half of the year	Stablize
UMC	85%-90%	Capacity utilization is expected to reach 88%-91% by year-end / 2027 Q1	Rise
SMIC	95%-96%	No possibility of product price cuts is seen within the year	Rise
GF	80%-90%	3D integration technology SLATE is scheduled for large-scale mass production in H2 2027	Rise
VIS	85%-90%	The company's capacity utilization approaches 90% in 2026	Stablize
PSMC	78%	Strong revenue and profit are expected for this year	Stablize
HUAHONG	>100%	Product price hikes are expected to continue in the second half of the year	Rise

Source: Chip Insights

(4) OSAT

Leading players operate at full capacity and accelerate capacity expansion.

Figure 13: Latest Updates of Major OSAT Vendors

Company	CU in 26.8	News in 26.8	26.9 Order Forecast
ASE	90%-95%	Q3 order visibility stands at around 4 months, with capacity utilization slightly above 90%	Rise
TSMC	100%	CoWoS capacity is in short supply with full order backlogs	Rise
JCET	85%-95%	Plans to invest RMB 7.8 billion to build a high-end advanced packaging and testing plant.capacity is doubling this year	Rise
TFME	80%-90%	Automotive packaging and testing revenue maintains high double-digit growth	Rise
HT-Tech	80%-90%	Q2 revenue hit RMB 5.711 billion, setting a new single-quarter high	Rise
Small and medium OAST	70%-80%	Positive outlook for demand absorption and follow-up price increases	Stablize

Source: Chip Insights

4.2 Distributors

Leading distributors widely expect memory-chip supply shortage to persist through H1 2027.

Figure 14: Latest Dynamics of Key Electronic Component Distributors

Company	News in 26.8
WPG	Operating performance in the second half is expected to outperform the first half, and memory shortage boom will last at least until H1 2027
WT	AI demand remains robust, while industrial, automotive and future businesses recover simultaneously

Company	News in 26.8
Smith	H1 2026 revenue reached USD 6 billion, breaking the previous annual record.connector lead-time ranges from 12-20 weeks
CECport	H1 2026 revenue hit RMB 73.556 billion (+164.19% YoY).net profit attributable to parent company stood at RMB 0.513 billion (+183.64% YoY)
Shenzhen Huaqiang	H1 2026 revenue hit RMB 17.748 billion (+60.65% YoY).net profit attributable to parent company stood at RMB 0.391 billion (+66.13% YoY)
SHANNON	Prosperity of memory industry is expected to extend into 2027
Yitao	H1 2026 revenue hit RMB 2.777 billion (+5.09% YoY).net loss attributable to parent company reached RMB 2.8963 million, turning from profit into loss
Sunlord	H1 2026 revenue hit RMB 8.722 billion (+121.56% YoY).net profit attributable to parent company stood at RMB 0.503 billion (+493.25% YoY)
BoBinfo	H1 2026 revenue hit RMB 7.386 billion (+90.18% YoY).net profit attributable to parent company stood at RMB 0.145 billion (+332.32% YoY)
ICkey	H1 2026 non-recurring net profit attributable to parent company rose 219.23% YoY, with outstanding performance in licensing business
P&S	Sales of distributed Murata products account for nearly one quarter of distribution revenue.inductor products will see price hikes starting from July

Source: Chip Insights

4.3 System Integrations

Order visibility remains strong for AI-focused businesses, while consumer-electronics businesses continue to face headwinds.

Figure 15: Recent Updates of Main System Integrators

Category	Company	News in 26.8
Consumer Electronics	Foxconn	August revenue reached 921.8 billion new taiwan dollars (+51.98% YoY), hitting a new high for the same period in history
	Huaqin	First-half revenue hit RMB 93.719 billion (+11.65% YoY), and net profit attributable to parent company was RMB 3.0 billion (+58.80% YoY)
	Longcheer	New businesses such as smart glasses and AI PCs drove the revenue share of AIoT to 20% in the first half
	BYD Electronic	Revenue from smart terminal components came under pressure in the first half.new projects including AI phones and AI glasses have entered mass production
	Luxshare	First-half revenue hit RMB 174.504 billion (+40.16% YoY), and net profit attributable to parent company stood at RMB 7.843 billion (+18.04% YoY)
	GoerTek	Product lines including AI smart glasses and smart wearables achieved steady development
	Wistron	PC shipments will decline in 2026 Q3, while desktops and monitors will remain flat quarter-on-quarter
	Compal	July PC shipments stood at 1.8 million units, down 25% QoQ and 21.7% YoY
	Quanta	Conservative outlook is maintained for PC shipment momentum in the second half
	Pegatron	July PC shipments reached 400,000 units, down 38.46% QoQ and 46.67% YoY
	Inventec	Severe shortages of CPU, memory and PCB occurred from August to September, preventing complete assembly for some products.PC shipments are expected to decline in 2026 Q3
Automotive Components	Bosch	The fourth-generation multi-purpose camera (MPC4) developed based on Horizon Journey 6B obtained large-scale mass production designation

Category	Company	News in 26.8
	MGA	Additional investment of RMB 40 million in Tianjin plant for equipment upgrade and new automated production lines.new plant under preparation in China.full-year sales expectation raised to USD 41.3-42.5 billion
	Lear	Full-year performance forecast raised
	FORVIA	First-half sales reached 10.51 billion euros (-4.3% YoY), beating market expectations
	DENSO	Orders in the China market declined, and developing Chinese clients will be a core priority going forward
	Aumovio	Full-year performance forecast lowered
	Mobis	R&D investment increased for electrification and autonomous driving
	CATL	Global EV battery market share reached nearly 40% from January to July
	BWA	China-based VCT and Mlock TOD will be launched in 2026
	AUTOLIV	Demand remains weak in European and American markets, while obvious growth is seen in China and India
	ZF	ADAS business divestment will be completed in H2 2026
	Aptiv	Interconnect businesses of Winchester Interconnect and Intercable Automotive Solutions (IAS) under the group are being integrated
	BYD Electronic	Automotive business is expected to maintain steady growth in the second half
	Svauto	Supply of core automotive-grade components tightens and raw-material prices fluctuate this year
	Luxshare	Automotive electronics revenue hit RMB 32.391 billion in H1 2026 (+274.10% YoY)

Category	Company	News in 26.8
	Joyson	Semi-solid-state battery obtained designation from a leading domestic firm, with mass production expected in Q4
	Huaqin	Automotive business reached RMB 1 billion in H1 2026, and full-year revenue is expected to double YoY to RMB 2.5-3.0 billion
	Foxconn	Model A has not yet entered mass-production phase
Industrial control	ABB	Q2 order volume stood at USD 12.042 billion (+30% YoY)
	Honeywell	Technology orders rose 16% YoY in Q2.divestment of Productivity Solutions and Services (PSS) business completed
	Siemens	Industrial business profit reached 3.5 billion euros, and order backlog exceeded one trillion
	SE	Jointly develop 800V DC solution with NVIDIA
	ETN	MV SST solid-state transformer obtained TÜV SÜD certification
	Delta	Revenue share of AI-server-related products exceeded 25%, and liquid-cooling proportion surpassed 12%
	Inovance	New-energy-vehicle business focuses on intelligent chassis and overseas market expansion
	Estun	Codroid 02 is undergoing small-batch verification mainly for handling and loading-unloading procedures, with small-batch orders secured
	MEGMEET	Full-stack AIDC layout evolves from project introduction to mass delivery
	EFORT	Industrial robot sales rose more than 10% YoY, ranking fifth in domestic market
	XINJE	Drive-system revenue reached RMB 0.564 billion in the first half, and embodied-intelligence business achieved explosive growth of 114.7%

Category	Company	News in 26.8
New Energy	Sungrow	AIDC-related businesses are expected to see extremely high growth in the next two years
	Trinasolar	Profitability of component segment is gradually recovering
	Ginlong	Current supporting ratio for residential energy-storage systems stands at 20%-30%, and the target supporting ratio will rise above 50% by 2027.selling prices of inverter business have not declined
	GoodWe	Energy-storage battery and energy-storage inverter businesses achieved rapid growth
	SINENG ELECTRIC	Gross margin of inverters climbed to 23.27%
	Deye	Inverter product revenue hit RMB 5.132 billion in H1 2026 (+94.09% YoY)
	APsystems	The company maintains stable order book at present
	Hoymiles	Micro-inverter / energy-storage system / PV system businesses recorded YoY revenue changes of -21% / +640% / -97% respectively in H1 2026
Data Center	Foxconn	USD 358.4 million capital increase for Vietnam subsidiary to expand CPO capacity, and for Mexico subsidiary to expand AI-server capacity.AI cabinet shipments are expected to deliver high double-digit growth and multiply for the whole year
	Wistron	AI servers account for more than 90% of server revenue
	Inventec	AI servers will maintain double-digit full-year growth
	Quanta	AI servers account for 75%-80% of total server revenue, with full-year target of 80%.order visibility extends to 2028
	Huaqin	Data-center business generated around RMB 20 billion revenue in the first half.super-nodes shipped in small

Category	Company	News in 26.8
		batches in Q2 and will roll out mass delivery starting Q3, with full-year revenue growth likely above 50%
	BYD Electronic	AI liquid-cold cold-plate project enters mass-production ramp-up phase.full-year server revenue is expected to exceed RMB 3 billion
	Luxshare	800G and 1.6T products for key clients are expected to ship in small batches in H2 2026.plan to expand optical-module production lines to around 10 within the next ten months
	MiTAC	First-half revenue hit RMB 72.818 billion (+45% YoY)
Communication	FLINES	No CPO co-packaged switch prototype available yet.pre-research on heat dissipation and hardware has been initiated
	STAR-NET	800G product revenue surged more than 300% YoY in the first half
	GONJ	Liquid-cooled servers have achieved the transition from production-line construction to large-scale mass production
	CIG	Capacity expansion pushed forward at Jiashan and Malaysia plants in the second half.construction of Mexico plant accelerated, striving for annualized optical-module capacity of 6 million units by year-end

Source: Chip Insights

4.4 End-Market Applications

(1) Consumer Electronics

Memory price hikes exert broad pressure on end-market orders, while 3C supporting industries deliver counter-cyclical high growth.

Figure 16: Latest Trends of Consumer Electronics Manufacturers

Category	Company	News in 26.8
Smart Phone	Apple	Storage costs are expected to rise further.hardware shipments for this year have indeed been revised down due to memory shortages
	HUAWEI	Mass-scale adjustments for mobile phones amid memory price hikes
	OPPO	Channel prices of some models have gone up
	vivo	Price adjustments across all product lines
	XIAOMI	Raise selling prices for selected phone models, with a common increase of RMB 300
	TRANSSION	First-half revenue reached RMB 35.431 billion, and smartphone ASP increased noticeably
PC	Lenovo	Q3 shipments are expected to stay flat quarter-on-quarter
	HP	Substantial decline in Q3 as inventory was pre-built for second-half promotions in Q2
	ASUS	Q3 is expected to improve driven by Chromebook and commercial demand
	Acer	Solid growth projected for Q2 thanks to stable supply of ODM models
	Dell	Q3 quarter-on-quarter performance kept flat supported by commercial demand
	Meta	Quest series sales keep declining
VR/AR	Rokid	Bird AR glasses take lead in market orders
	Apple	Contract manufacturers have suspended Vision Pro production
	XREAL	Leading position in consumer AR glasses market
UAV	DJI	Global consumer-grade market share exceeds 70%

Category	Company	News in 26.8
E-bike	Aerospace	First-half revenue hit RMB 0.891 billion (+9.87% YoY), with net profit attributable to parent company of RMB 75.37 million
	AeroHT	The 1000th set of electric propulsion unit rolled off the production line at the flying car mass-production plant
	XAG	Net profit exceeded RMB 130 million in H1 2026, gross margin rose to 34%
	Ninebot	Sales of smart electric two-wheelers reached 2.844 million units in H1 2026 (+19% YoY)
	NIU	H1 2026 revenue hit RMB 2.35 billion (+21.26% YoY), with a loss of RMB 196 million
	LUYUAN	H1 2026 revenue hit RMB 2.463 billion (-20.42% YoY), net profit stood at RMB 75 million (-31.80% YoY)
	Yadea	Electric bicycle sales reached 4.1481 million units in H1 2026 (-37.8% YoY)
3C Products	Anker	Revenue from charging and energy-storage products reached RMB 8.93 billion in H1 2026 (+31.0% YoY)
	UGREEN	Overseas revenue accounted for 66.9% in H1 2026, with European market growth of 89.3%
	CE-LINK	Gross margin of electronic products dropped from 24.39% to 13.92% in H1 2026

Source: Chip Insights

(2) New Energy Vehicles

Traditional automotive giants led by German OEMs face sharp setbacks, reshaping the global automotive competitive landscape.

Figure 17: Developments of New Energy Vehicle Makers

Company	News in 26.8
BYD	Returned to the global top-seller of BEV in 2026 Q2, with Tesla falling to second place
Tesla	Automotive gross margin stood at 16.9% in 2026 Q2, down 30 basis points year-on-year
Honda	Pure-electric strategy significantly scaled back.cooperation with General Motors Ultium platform terminated
Volkswagen	Plans large-scale layoffs and potential shutdown of multiple local plants.one-quarter of management positions to be cut
BMW	Delivered 262,000 units in China in H1 2026, down 20.4% YoY.EBIT of automotive business decreased by 48.1% YoY
Benz	Full-year 2026 sales volume and revenue forecasts lowered
Toyota	August sales of hybrid models rose 20% YoY, while U.S. sales dropped 4.4% YoY
Ford	August electric vehicle sales plunged nearly 80% YoY
Stellantis	Set up a new EUR 1 billion joint venture with Dongfeng Group focusing on new-energy businesses
GM	Continued layoffs at the Lansing plant in Michigan
Hyundai	EV sales in Europe exceeded 100,000 units in H1 2026
SAIC	Renewed China joint-venture agreement with General Motors for 20 years.August new-energy sales hit 190,800 units (+47.06% YoY)
Renault	The proportion of electrified vehicles rose to 52% in H1 2026
GAC Aian	New-energy vehicle sales reached 368,200 units from January to August, up 63.06% YoY
Changan	New-energy sales hit 100,496 units in August, rising 12.98% YoY
Gellyauto	New-energy sales hit 175,877 units in August (+19% YoY), with penetration rate climbing to 65%
Chery	New-energy sales hit 120,909 units in August, exceeding 100,000 units for five consecutive months

Company	News in 26.8
LEADING IDEAL	Self-developed batteries will be gradually equipped across all vehicle models starting from the second half of 2026
LEAPMOTOR	Exports reached 96,294 units in H1 2026 (+372.6% YoY), surpassing total exports for full-year 2025
XIAOMI	Total automotive sales are projected at 450,000-460,000 units for 2026. overseas business will officially launch in H2 2027 and is currently in the early stage of market research and layout
SERES	New-energy vehicle sales reached 24,244 units in August, down 43.96% YoY
NIO	Monthly sales are expected to exceed 40,000 units in Q4, with per-vehicle gross margin flat versus Q2
XPeng	Cooperation project with Volkswagen is expected to contribute RMB 0.5-1.0 billion revenue per quarter in Q3/Q4
GWM	Overseas revenue hit RMB 56.288 billion in H1 2026 (+56.83% YoY), accounting for 55.13% of total revenue

Source: Chip Insights

(3) Industrial Control

AI robots have become a shared strategic priority for industrial-control leaders. Multinational giants speed up local capacity deployment within China.

Figure 18: Recent Updates of Industrial Control Manufacturers

Company	News in 26.8
ABB	New transmission base to be built in Nanjing
Siemens	Announced over USD 200 million investment in the United States to expand electrical infrastructure production. plans to sell majority stake in steam turbine business in cooperation with Goldman Sachs
ETN	Smart power equipment project settled in Changzhou

Company	News in 26.8
Honeywell	Full-year performance forecast raised
SE	Revenue from data center switchgear products is expected to reach about USD 180 million in 2026
FANUC	Wholly acquired PCI Energy Software for more than RMB 9 billion
Delta	Accelerates layout in AI robots, extending from industrial automation to embodied intelligence and humanoid robots
Inovance	Integration of AI and automation business serves as one of the company's core development strategies
Estun	First-half revenue hit RMB 2.578 billion (+1.14% YoY), and net profit attributable to parent company reached RMB 0.161 billion (+2314% YoY)
MEGMEET	Orders in the second half are significantly higher than those in the first half
EFORT	First-half revenue hit RMB 0.656 billion (+28.93% YoY), and net profit attributable to parent company stood at RMB -56.9258 million (narrowed loss by 62.48% YoY)
XINJE	First-half revenue hit RMB 1.102 billion (+25.60% YoY), and net profit attributable to parent company reached RMB 0.155 billion (+21.98% YoY)
Leadshine	Total servo shipments exceeded 1 million axes in the first half.both orders and batch deliveries achieved breakthroughs in humanoid robot component business
Unitree Robotics	The company ranked second with shipments of 5,900 units and 31% market share in the first half, with shipments rising 170% YoY
TESLA	Weekly robot output stood above 200 units at end-July, increased to 500 units at end-August, and is expected to rise above 600 units in September

Source: Chip Insights

(4) Photovoltaic

Signs of structural divergence emerge across the PV sector.order recovery is

anticipated in H2.

Figure 19: Latest Dynamics of PV Manufacturers

Company	News in 26.8
LONGi	BC module sales reached 19.55GW in H1 2026 (+125% YoY), overseas module sales rose 26% YoY, and the overseas revenue share of modules jumped above 65%
Trinasolar	The second half is the traditional peak season for domestic pv installations, and purchasing enthusiasm from downstream is expected to pick up
TONGWEI	High-purity polysilicon shipments hit 155,300 tons in H1 2026 (ranking first in the industry), cell shipments reached 34.78GW (cumulative volume exceeding 400GW), module shipments stood at 13.07GW with overseas share close to 40%
JKS	Module shipments hit 29.64GW in H1 2026, ranking first in the industry, with overseas shipment share at roughly 70%
JASO	Cell and module shipments reached 22.25GW in H1 2026, and overseas shipment share accounted for 68.46%
CSIQ	Silver-copper plating technology is planned to be introduced in H2 2026, targeting a 40% reduction in silver consumption per watt by year-end
Risen	Conversion efficiency of HJT solar cell exceeded 27%
Aiko	First-half revenue hit RMB 9.183 billion (+8.72% YoY), with net loss attributable to parent company of RMB 0.754 billion
DMEGC	Demand in the second half is expected to outperform the first half
GCL	Gross margin of solar business stood at 2.07% in H1 2026, down 2.97 percentage points year-on-year
HNDA	No significant price increase was observed across the industrial chain in H1 2026

Source: Chip Insights

(5) Energy Storage

Overseas demand stays strong, the market landscape of rising shipment volume alongside falling prices persists.

Figure 20: Developments of Energy Storage Suppliers

Company	News in 26.8
Fluence	New orders reached USD 1.44 billion in 2026 Q2, nearly tripling YoY, and order backlog climbed to USD 6.4 billion
Sungrow	Overseas demand will remain strong next year, especially in Europe and the United States. AIDC energy-storage orders on hand reached about 2GWh in the first half, with follow-up projects totaling more than ten GWh
CATL	Launched online direct-sales platform for energy storage, with cell prices as low as RMB 0.395/Wh
TESLA	Megafactory officially entered production, with designed annual capacity of 50GWh
CSIQ	Energy-storage shipments hit 6.1GWh in H1 2026 (+103% YoY)
Sinexcel	Energy-storage revenue hit RMB 0.38 billion in H1 2026 (+35.3% YoY), with gross margin of 38.1% (up 10.3 pct YoY)
EVE	Energy-storage shipments are expected to grow substantially next year
Pylon	European residential storage recovers, U.S. and Japan grow steadily, and emerging-market demand in Asia and Africa is released
Sineng	Rapid growth of overseas sales serves as the primary growth driver
Trinasolar	Overseas shipment share exceeded 90% for energy-storage business in the first half, with high-value markets such as Europe and Latin America delivering better profitability

Source: Chip Insights

(6) Data Centers

Financing, computing-power reserves and monetization capability will

define competitive dynamics in the next phase of the AI market.

Figure 21: Recent Updates of Data Center Equipment Vendors

Company	News in 26.8
OpenAI	Suspend training of some frontier models to ensure safety, alignment and monitoring capabilities keep pace with model capability leaps
DeepSeek	Revenue from January to July reached approximately RMB 0.475 billion (about 9 times higher than full-year 2025), with net loss of around RMB 0.715 billion. The second-round financing is restarted, targeting fundraising of RMB 500 billion (about USD 74 billion)
Anthropic	Reached a USD 9 billion cloud cooperation agreement with Riot Platforms. Signed a USD 35 billion cloud-computing deal with Lambda, a cloud service provider invested by NVIDIA. Signed a six-year USD 45 billion cloud-computing capacity lease agreement with UK-based AI infrastructure provider Nscale
Meta	Will open-source weights of its most powerful AI model Llama 3.1
Kimi	Launched Series G pre-IPO financing with pre-money valuation of USD 500 billion
NVIDIA	Acquired Hugging Face for USD 12.93 billion
AWS	Will purchase 2 million NVIDIA chips for data-center expansion
Oracle	Plans to launch a new round of layoffs. Acknowledges that AI applications are one of the factors driving job cuts
MS	Confirmed development of Copilot super-application
Google	DeepMind undergoes comprehensive restructuring
ByteDance	Launched Seedance 2.5 model. Plans to raise capital expenditure to USD 700 billion this year, potentially hitting USD 1 trillion next year
Alibaba	Plans to more than triple global data-center capacity
Supermicro	Q2 profit surged and sales nearly doubled
DELL	Raised fiscal-year 2027 forecast driven by strong AI-server business momentum
HUAWEI	Accelerated testing of new-generation AI chips (Ascend series)

Company	News in 26.8
ZTE	Revenue from computing power segment rose more than 55% YoY, accounting for 35.1% of total revenue

Source: Chip Insights

(7) Communications

European and U.S. carriers push forward cost optimization. China's three major telecom operators shift capital expenditure toward computing power and AIDC infrastructure.

Figure 22: Latest Trends of Communications Manufacturers

Company	News in 26.8
T-Mobile	Completed a USD 2.9 billion spectrum deal, transferring 800MHz spectrum to Grain Management
AT&T	About 2,100 positions have been cut so far in 2026
Verizon	Around 3,000 positions were cut in august, and 274 directly-operated stores were sold and converted to franchise model
Vodafone	1,200 positions have been cut in europe as part of a EUR 2 billion cost-reduction program
BT Group	Plans to reduce headcount from 130,000 to 75,000-80,000 by 2030 (a reduction of roughly 40%)
CMCC	Capital expenditure reached RMB 61 billion in H1 2026 (+4.5% YoY).computing-power network investment rose 71% YoY and intelligent network investment grew 85% YoY
CU	Computing-power business revenue hit RMB 41.9 billion in H1 2026 (+13% YoY), becoming the primary growth driver
CT	Intelligent computing revenue increased 95% YoY in H1 2026, and AIDC revenue rose 9.3% YoY
ZTE	Operator network business revenue stood at RMB 31.77 billion in H1 2026, accounting for 40.7% of total revenue, while domestic operator investment in communication infrastructure continued to decline

Company	News in 26.8
Cisco	AI infrastructure revenue is expected to reach USD 7.5 billion in fiscal year 2027
Ericsson	Completed north america' s first low-latency mobility (LTM) live-network test with MediaTek and AT&T
NOKIA	Plans to close hangzhou R&D center and cut 1,600 employees

Source: Chip Insights

(8) Medical Devices

Amid normalized volume-based procurement, the “multinational retreat, domestic advancement” pattern continues. AI and surgical robots stand out as key areas of focus.

Figure 23: Developments of Medical Device Manufacturers

Company	News in 26.8
JNJ	Q2 revenue of medical equipment & devices division reached USD 8.9 billion, up 4.5% YoY, slightly below market expectations
Medtronic	Made USD 700 million strategic investment in ConoTron.plans to acquire ai-imaging firm CathWorks
Siemens Healthineers	Cumulative revenue in china region reached 1.65 billion euros in the first three quarters, down 10.9% YoY
BSX	Overall operations in china remain normal
PHILIPS	First-half revenue in china region hit 604 million euros, with a mild increase of around 4.3% YoY, while management expects slower growth in Q3
ABT	Q2 revenue rose 13% YoY to USD 12.59 billion, and adjusted gross margin climbed to 58% (up 100 basis points)
GE Healthcare	Plans to acquire ai brain-imaging analytics firm icometrix.intends to divest PCS business with annual revenue of USD 3.086 billion.cumulative first-half revenue in china region stood at USD 1.149 billion, down 0.6% YoY

Company	News in 26.8
Mindray	Overseas business revenue hit RMB 9.471 billion in H1 2026 (+13.67% YoY), accounting for over 53% of total revenue
UIH	Domestic market share rose by 1.7 percentage points against market headwinds in H1 2026. overseas revenue share exceeded 25%

Source: Chip Insights

5 Distribution and Sourcing Opportunities and Risks

5.1 Opportunities

Boom in China's computing-power supply-chain orders continues. watch volatility across the PV supply chain.

Figure 24: Key Opportunities In Segmented Markets

Opportunity Focus	Impact	Related Industries	Relevant Manufacturers
Domestic share of high-end ai chips in china approaches 90% this year	Domestic ai supply chain benefits from the trend	AI chips	Hisilicon, cambricon, haiguang information, etc
Total intelligent computing scale in china reached 2.45 million pflops by the end of july	Prosperity of computing-power supply chain continues	AI servers, etc	Hisilicon, inspur, lenovo, etc
Eight major pv polysilicon players signed initiative: no sales below cost price	Upstream prices are expected to stabilize	Photovoltaic, etc	Longi green energy, trina solar, jinko solar, etc

Source: Chip Insights

5.2 Risks

Pricing uptrend persists for memory chips, MCUs, power devices, analog chips and MLCCs.

Figure 25: Risk Warning For Segmented Markets

Risk Warning	Impact	Related Industries	Relevant Manufacturers
ST announced the third round of price hikes for the year effective august 23	Price-hike cycle continues	MCU / power devices / analog chips, etc	ST, Infineon and TI, etc
August-october marks a new price-increase cycle for domestic and overseas mlcc manufacturers	Price increases for mid-to-high end mlcc persist	MLCC	Murata, SEMCO and TDK, etc
Power semiconductor vendors in chinese taipei region are preparing for the third wave of price increases	Pay attention to supply-chain volatility	Power devices	ST, Infineon and onsemi, etc
Samsung electronics: dram production expansion pace in the second half may fall below expectations	Dram maintains rising volume and price	Memory	Samsung, Samsung and Samsung, etc

Source: Chip Insights

6 Summarize

August marked the official kick-off of the semiconductor industry's third-round price-hike cycle. Coupled with rising supply-chain costs, tightening supply-demand balance and expanding demand for domestic supply-chain development, WSTS sharply upgraded its 2026 global semiconductor sales-growth forecast to 108%, with memory-chip growth projected at 302%. The upward cycle featuring rising volume and prices gains momentum.

For 2026 Q3, industry prosperity is expected to continue. AI computing-power infrastructure remains the highest-certainty growth engine. Nevertheless, price increases for memory, power semiconductors and foundry services may moderate from Q2's sharp surge, shifting from broad-based shortage and price hikes toward structural divergence. It is worth noting that end-consumer tolerance for higher prices nears its limit, driving conservative procurement strategies. Meanwhile geopolitical uncertainties including tariff policies and export controls linger. Chip Insights forecasts high-volatility structural market conditions in H2. market participants are advised to exercise prudence.

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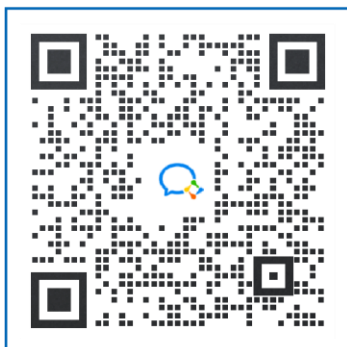
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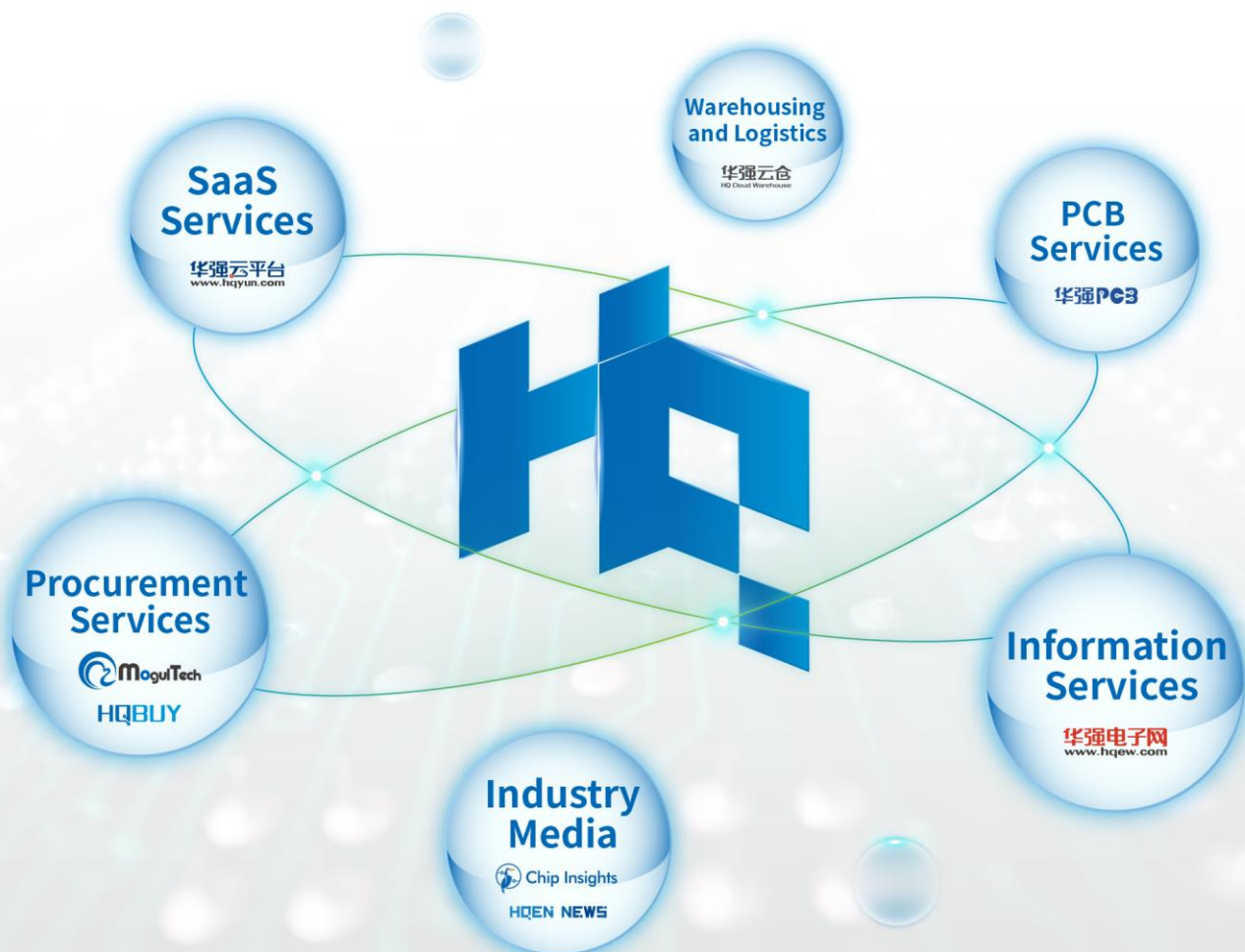
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Huaqiang Electronic Network Group is an industrial internet B2B comprehensive service provider that focuses on the vertical industry chain of electronic components. The company is driven by digitization, oriented towards platformization, and based on a combination of online and offline B2B services. It provides professional **global procurement services and comprehensive information services** to participants in the industry chain. Its goal is to establish efficient connections between the supply and demand sides of electronic components, reduce information asymmetry, and improve transaction efficiency and customer service levels in the electronic component industry chain.

With its own diverse industrial chain advantages, HQEN Group will collaborate deeply and complementarily with logistics, capital flow, and information flow in the future. It will focus on vertical application areas of electronic components and related products. Through continuous innovation in service content, it will further build a multi-level, stock-based ecosystem that meets the long-tail procurement needs.

HQEN Group is committed to creating a world-class industrial internet platform for electronic components.

Electronic Components B2B Comprehensive Service Provider





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