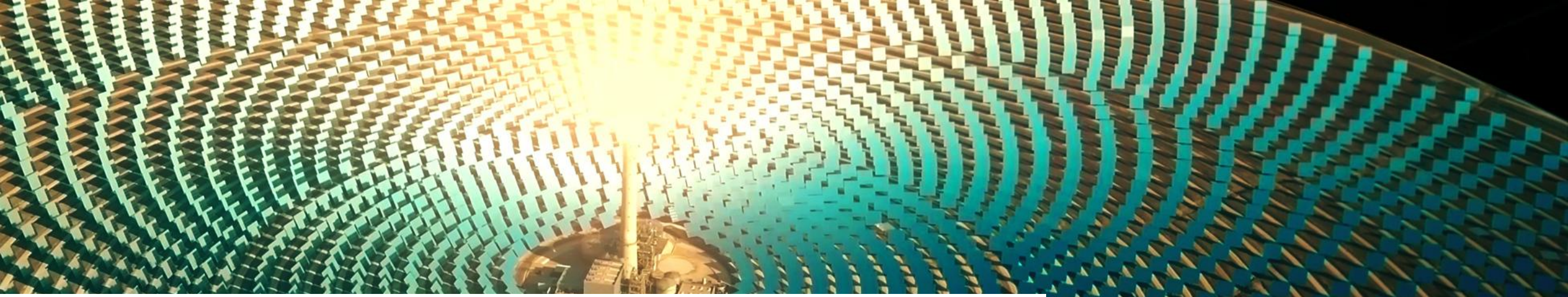
Five Years Out



Electronic Coast

Markedsoppdatering

Jan Erik Engemoen – Daglig Leder

Global Components overview

Product Distribution

Distribute semiconductor components and interconnects, passives & electromechanical devices (IP&E)

Semiconductors

IP&E

Global reach
180 sales locations
39 distribution facilities
Hundreds of suppliers
Thousands of customers
No one customer accounts for > 2% of sales

Value Add Solutions

Industry leading engineering capabilities and supply chain services that accelerate customers' go-to-market

Supply Chain Services

Providing improved supply chain visibility, managing supply/demand, inventory, order management, fulfillment and logistics for our customers

Integration Services

Building and integrating technology solutions to bring innovative products to market faster by leveraging an ecosystem of world-class suppliers

Engineering & Design Services

From design engineering support for our customers' new product introductions to complete turn-key engineering solutions

Global components sales

$21.5B

Asia[1]

~41%

Europe[1]

~26%

America[1]

~32%

1. Regional mix based on FY 2025 actuals

Arrow Components EMEA Facts

CUSTOMERS

40.000+

EMPLOYEES

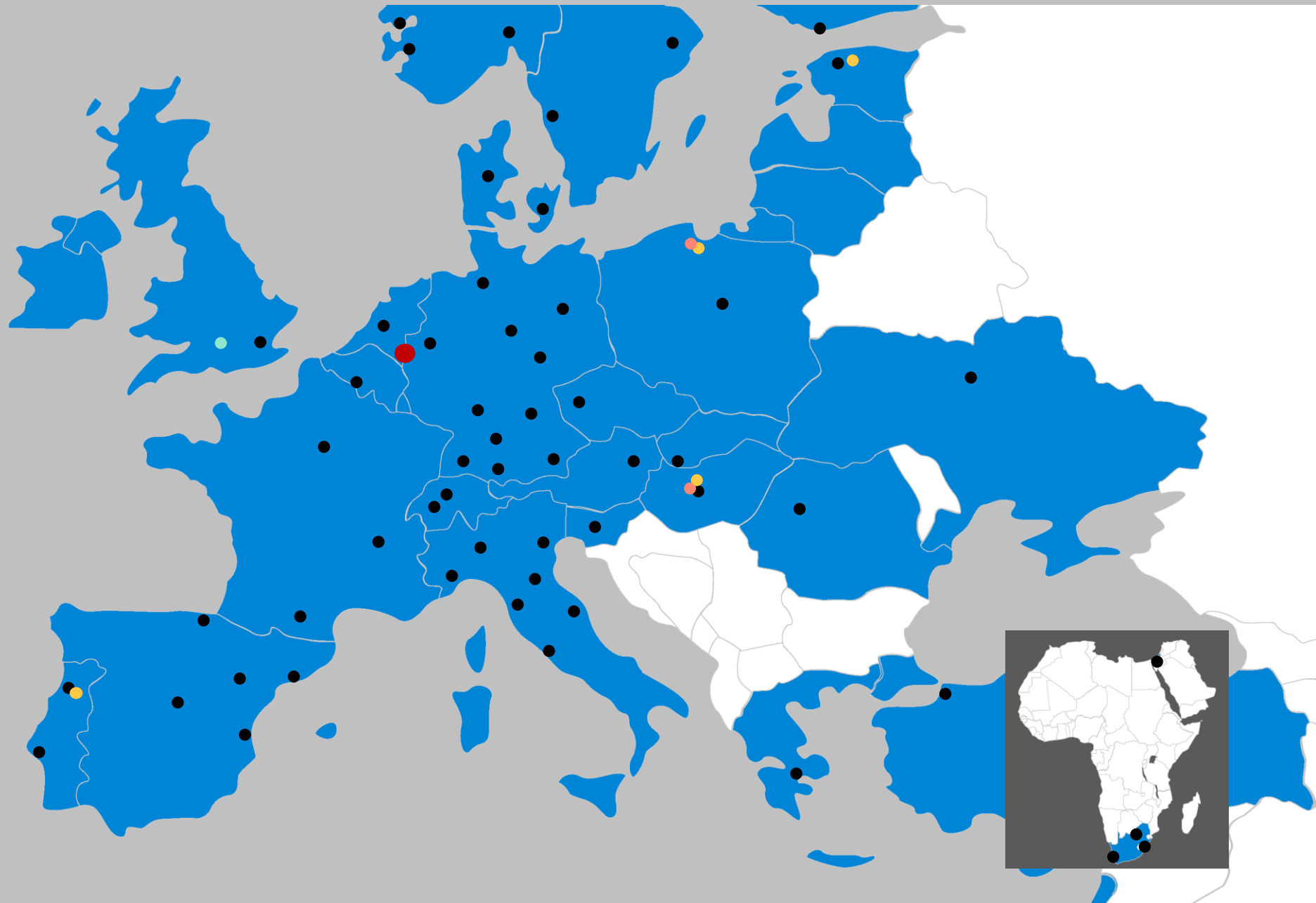
3.500+

SUPPLIERS

500+

2025 EMEA REVENUE (USD)

$5.6B



- Arrow Branch Office
- Engineering Solutions Center (ESC)
- Arrow Power Supply Design Center
- Customer Service Center
- Primary Distribution Centre

x10

90,000 sqm

7km conveyors

78 docks

Van der Lande
Adapto System

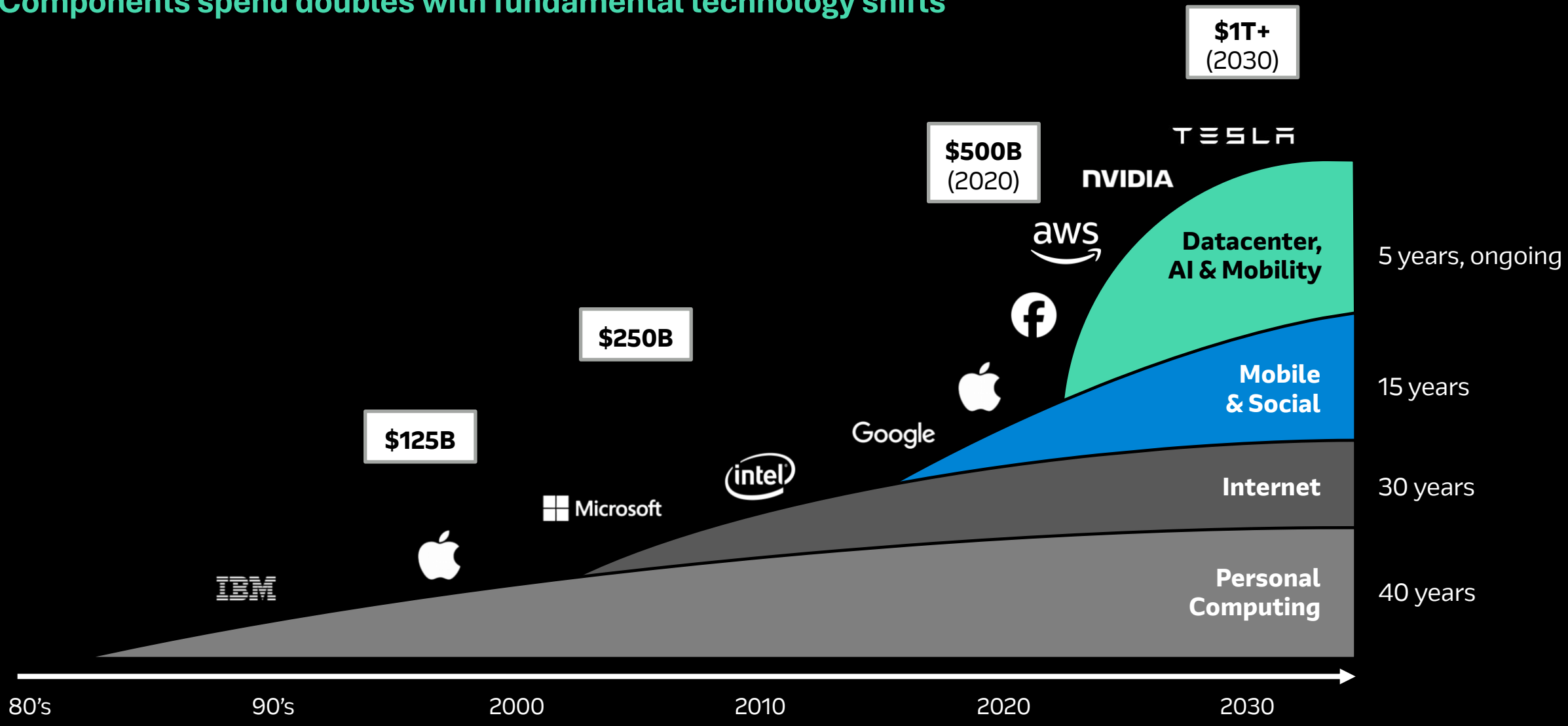
7 MWh Green
energy created

Market Update
Product Management EMEA

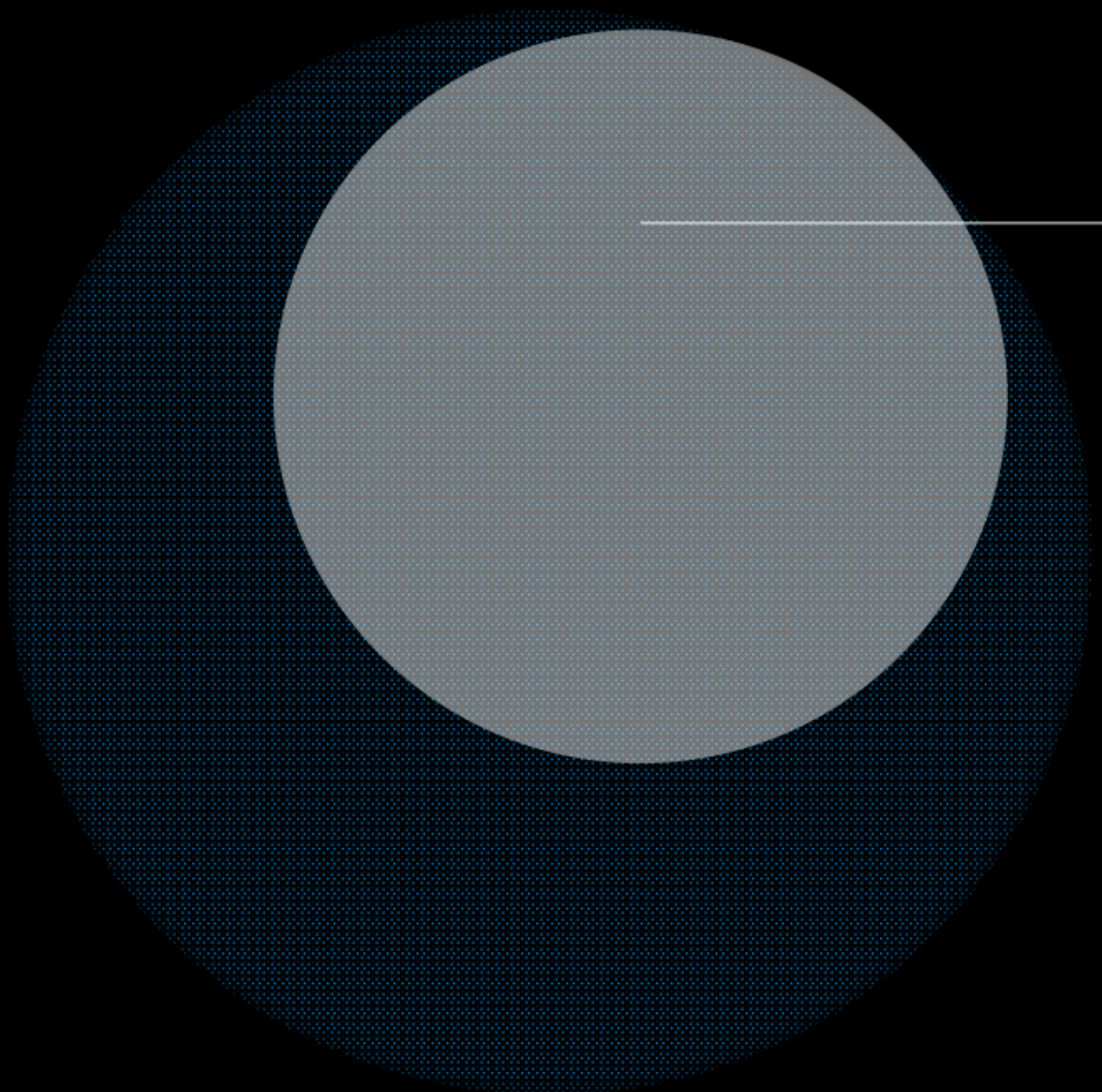
Semiconductors &
IP&E

Five Years Out

Components spend doubles with fundamental technology shifts



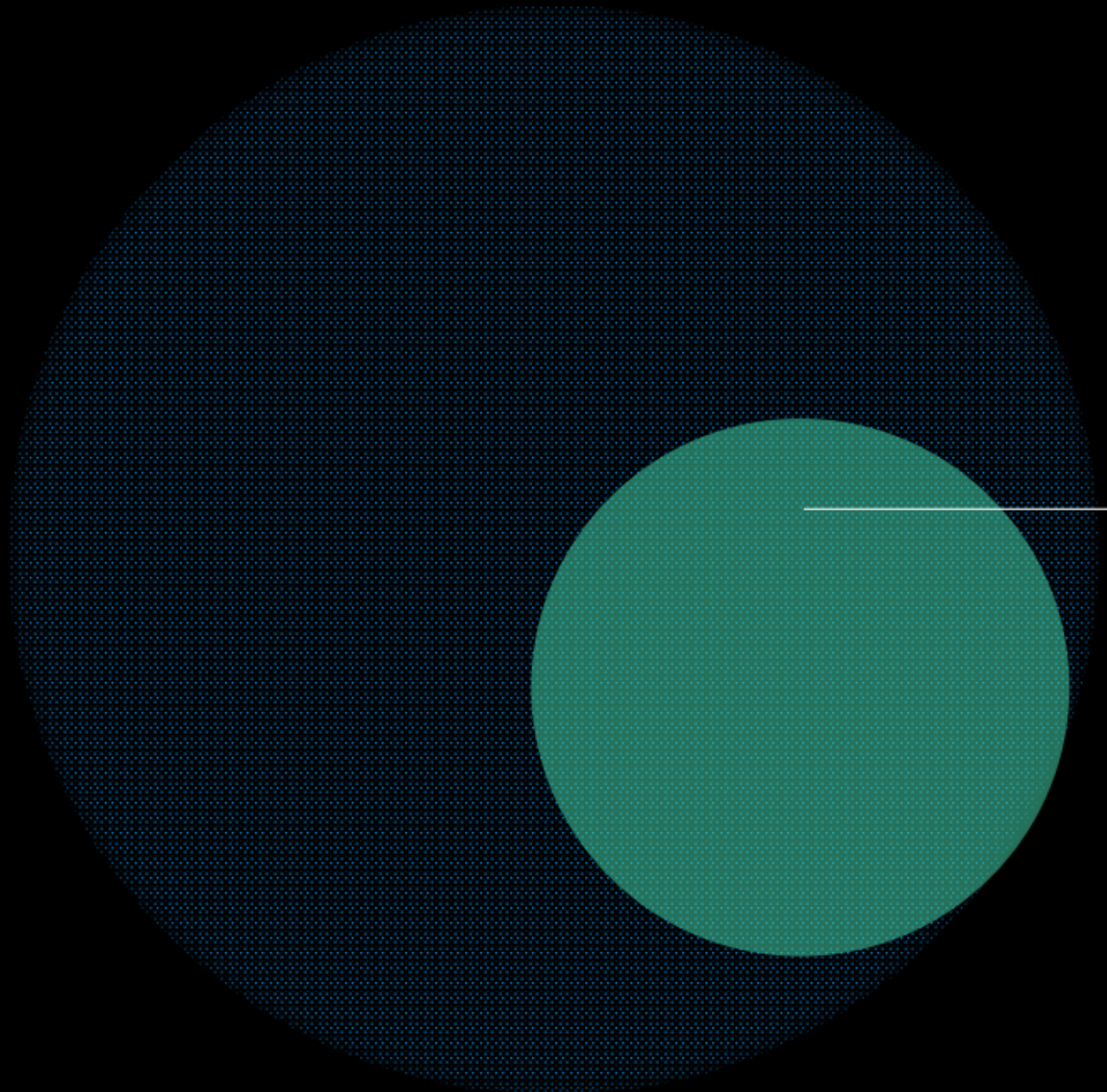
Global Semiconductor Market



63%

Top 10 Manufacturer

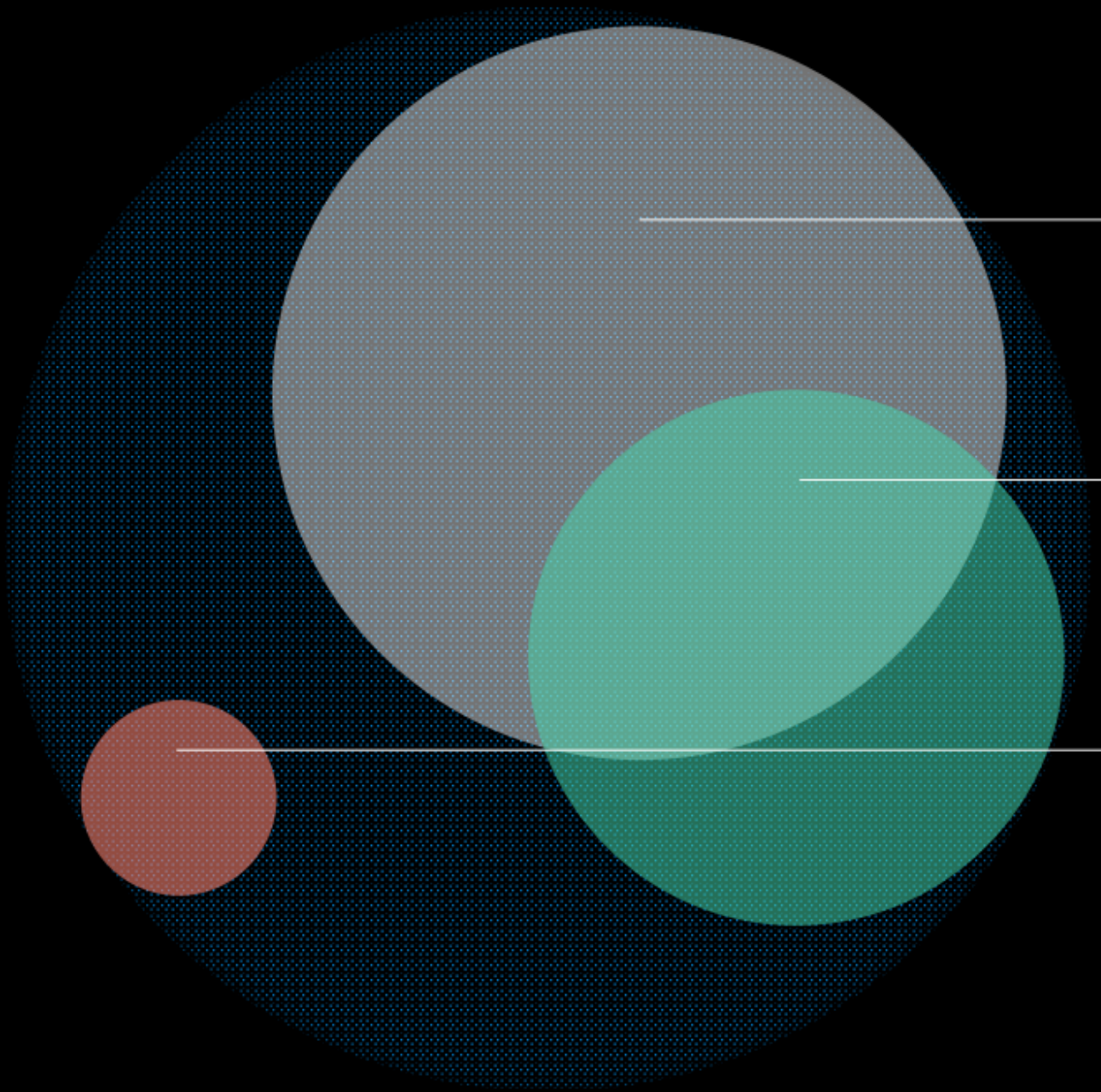
Global Semiconductor Market



49%

Top 10 Customer

Global Semiconductor Market



63%

Top 10 Manufacturer

49%

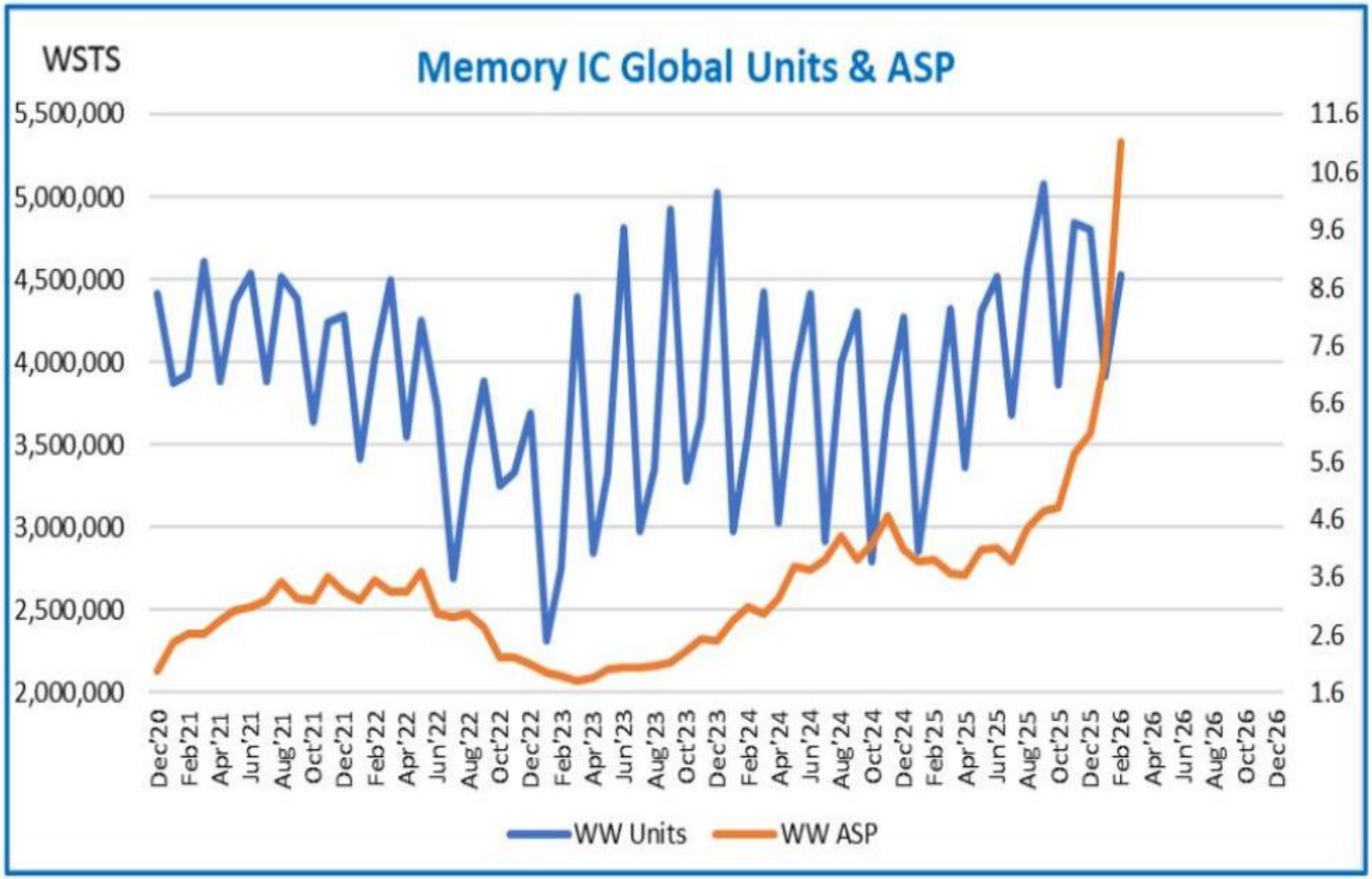
Top 10 Customer

8%

EMEA Market

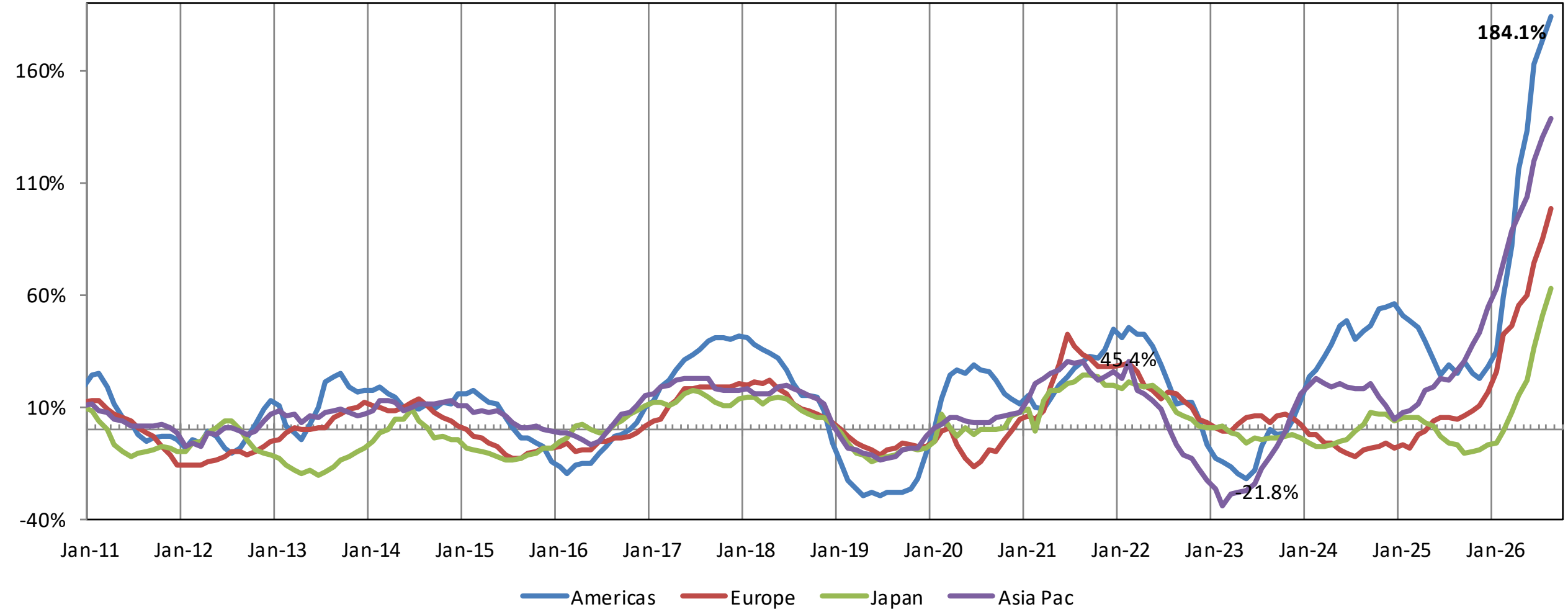
Market Update

Memory ICs = 50% of Total Semiconductor Revenue in February 2026



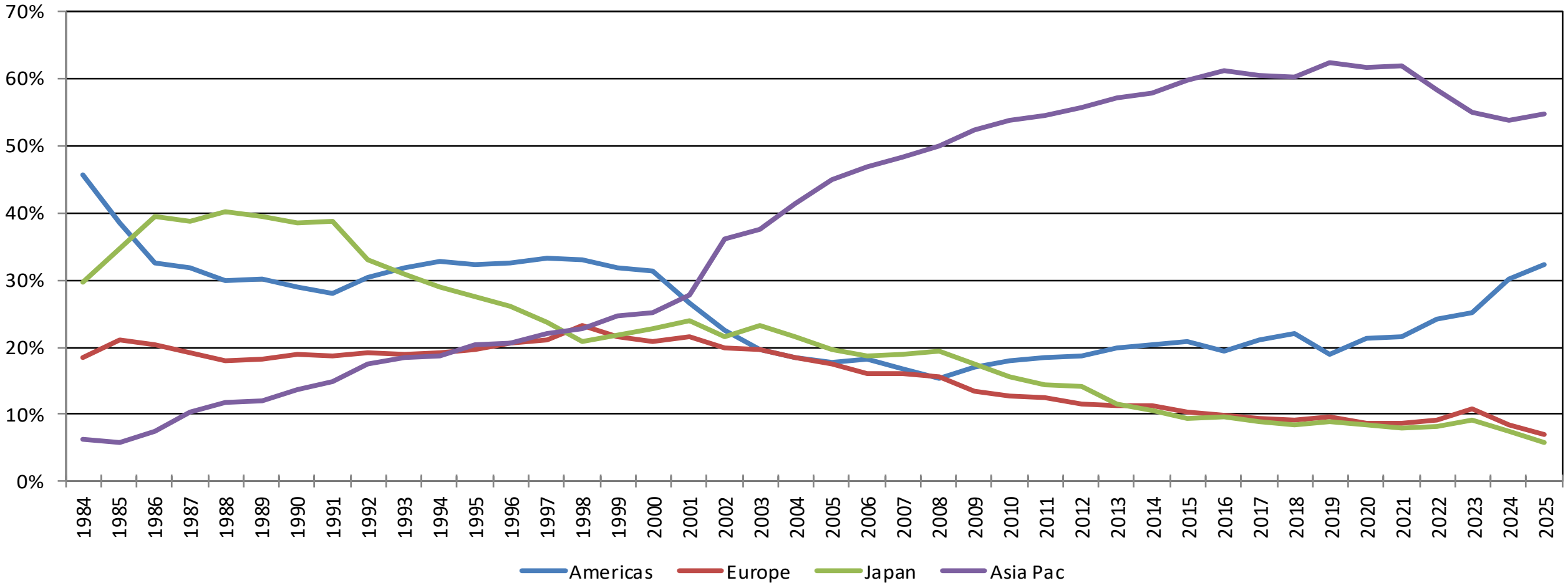
Y/Y Growth in Monthly Billings

Previously peaking in February 2022, year over year growth had consistently declined, to a trough in April 2023.
Current Upturn market officially began in April 2025 and Y/Y growth rate
in the Americas stands at 184.1%.



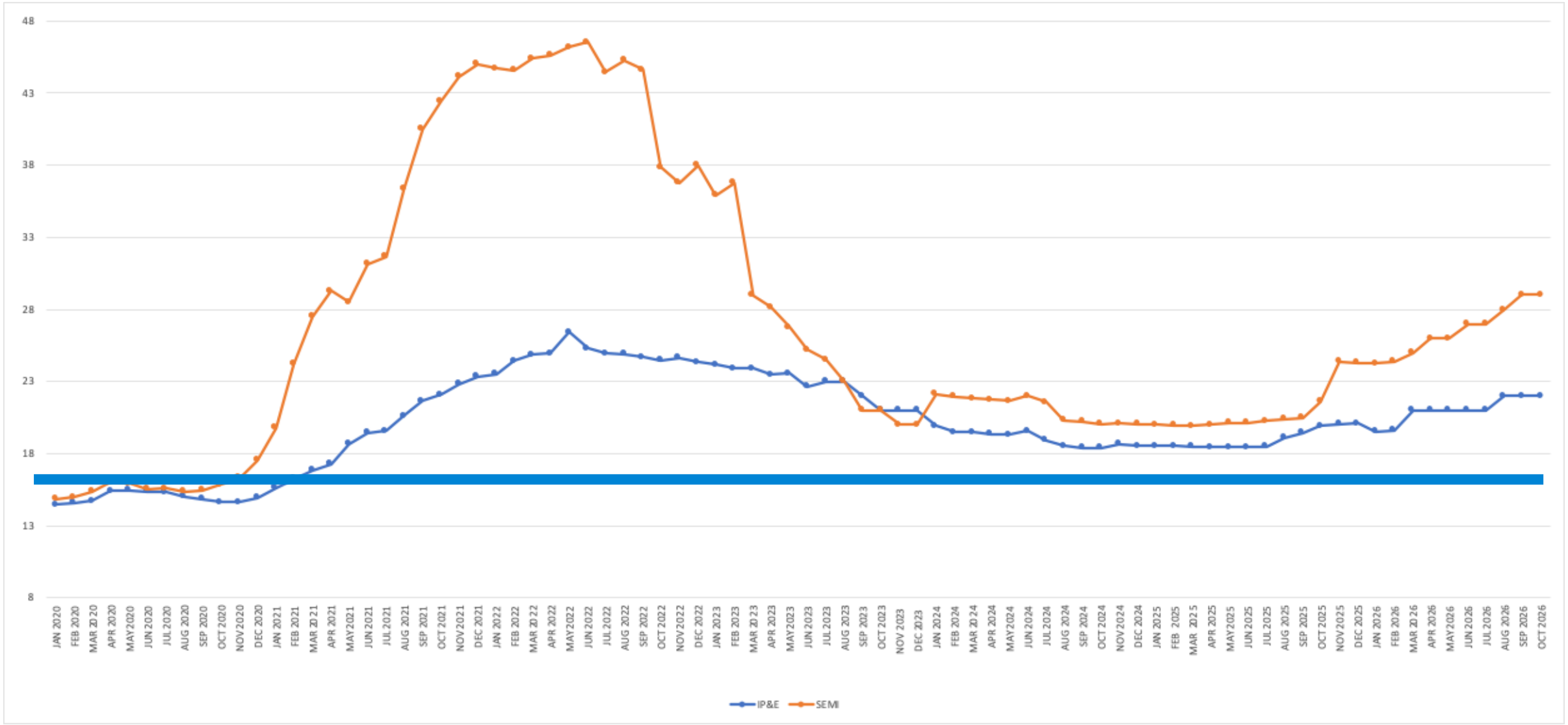
Source: Semiconductor Industry Association (SIA) & World Semiconductor Trade Statistics (WSTS) - 3 month rolling average billings

Regional Share



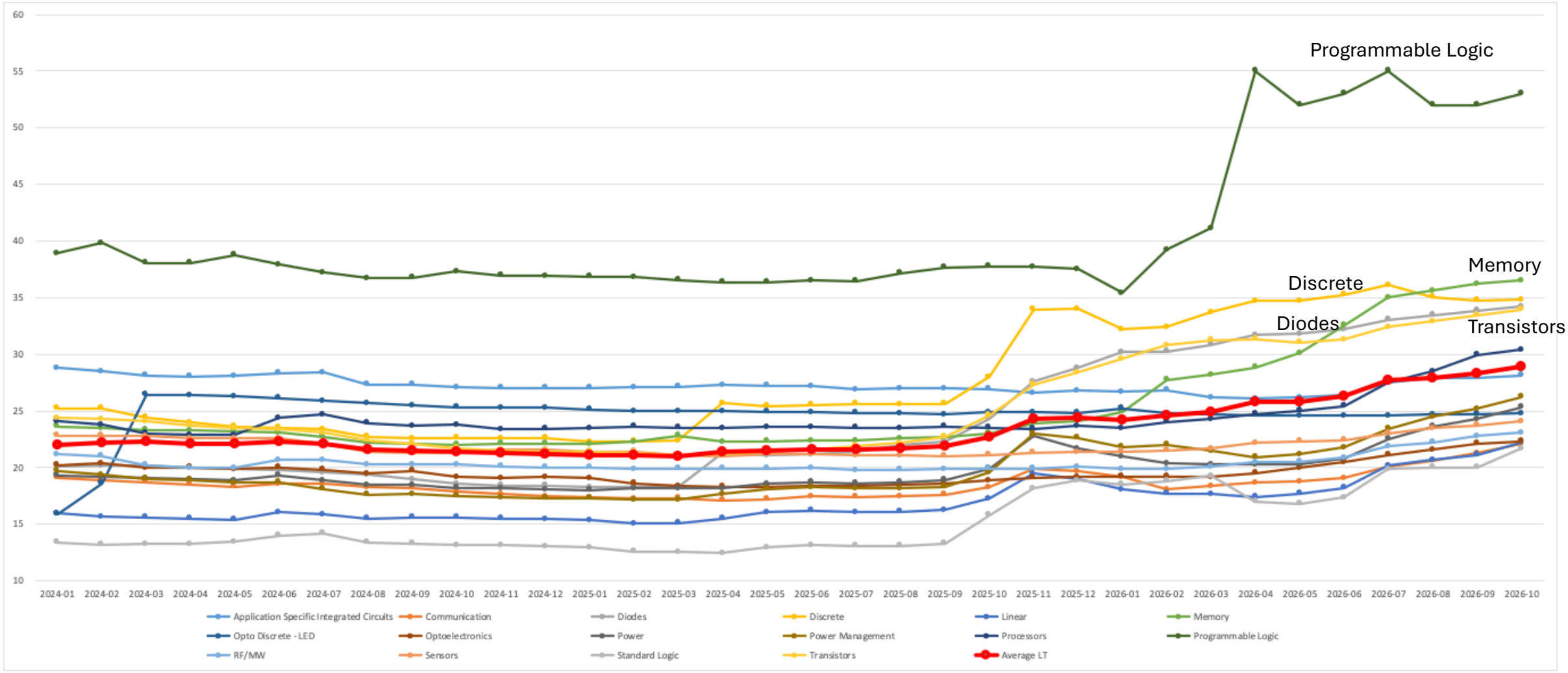
Source: Semiconductor Industry Association (SIA) - 3 month rolling average billings

Average Lead Time Trend For IP&E and SEMI



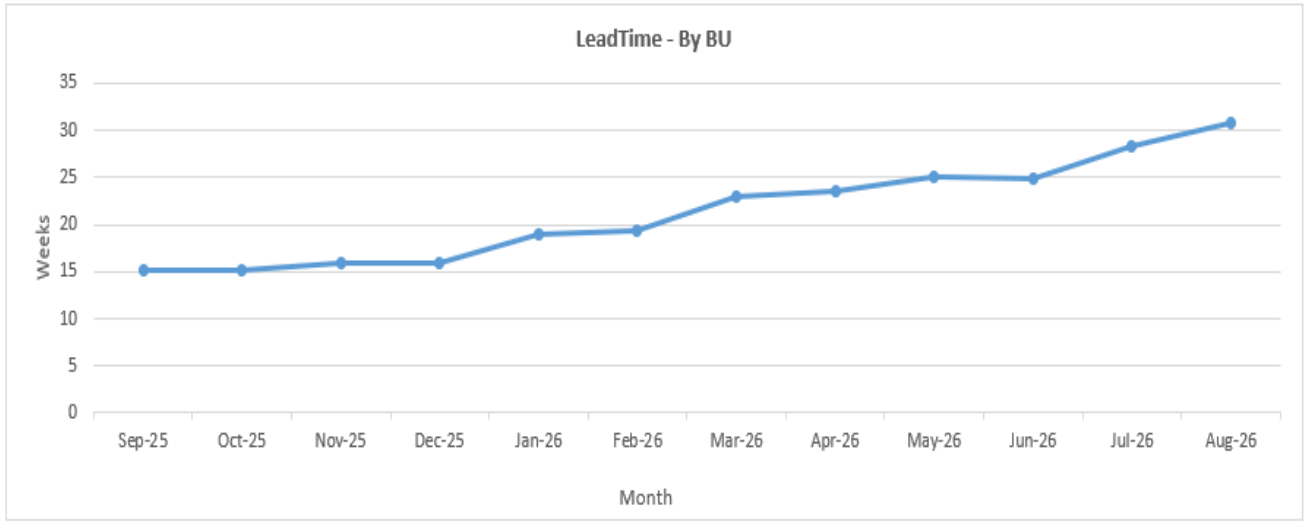
Source: Arrow Inc Lead Times

SEMI – Lead Time Trend by Key Technology



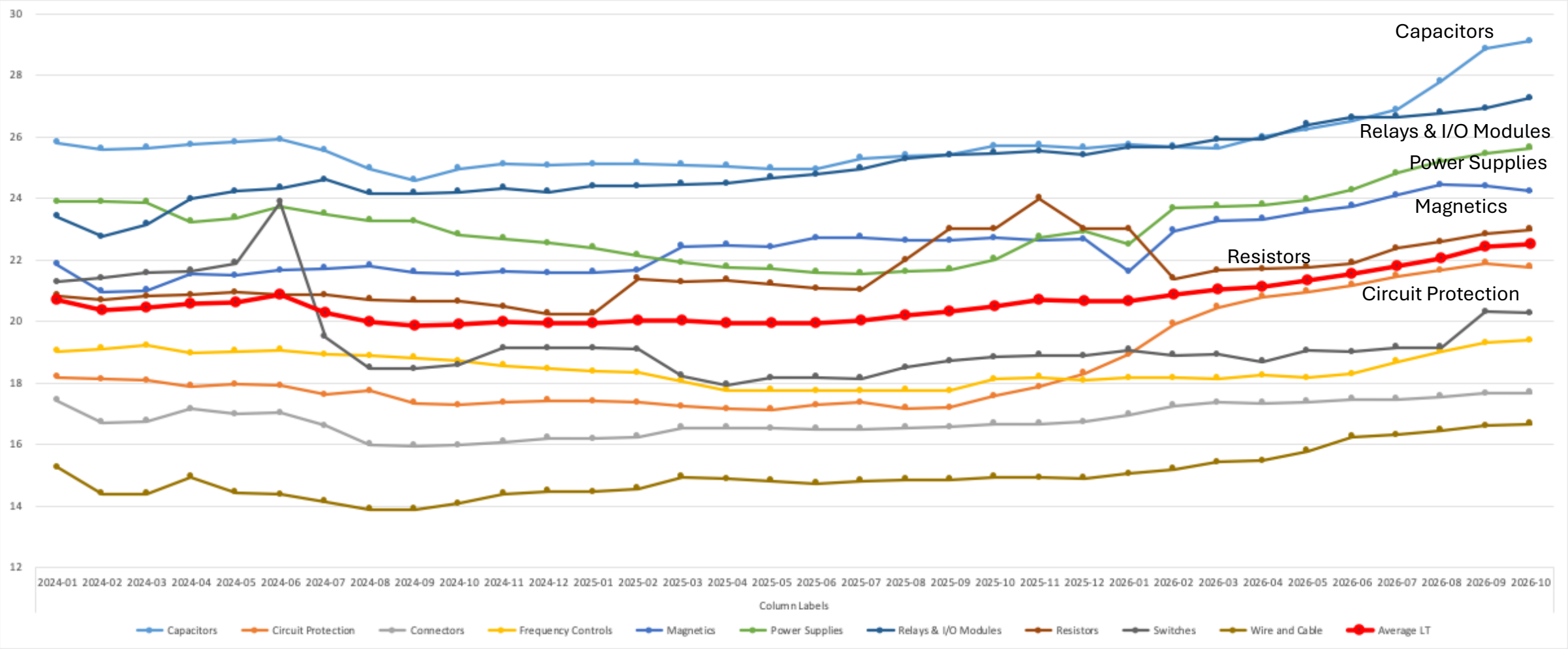
Source: Arrow Lead Times

Lead time trends- 12-month Overview



- **Average Lead Times have stretched**
  - Average lead time beginning of Q4 2025: 16 weeks
  - Current average lead time: 31 weeks
- **Excess inventory has moved through the supply chain, increase in short cycle orders from the customer base**
  - Additional global demand increase based on Nexperia “situation”
- **Increases mostly centered on discrete components**
  - Analog products lead times have remained constant
- **Demand increases have put “strain” across the manufacturing process**
  - Raw material, lead frames, Epi etc.
  - Wafer lead time increase as die banks have been reduced
  - Capacity constraints at Test and Assembly – 10 packages
- **MOSFET lead times continue to extend across the industry based on wafer / package capacity**
- **Return to normal cycle times expected in CY27**

IP&E – Lead Time Trend by Key Technology



Source: Arrow Lead Times

TEXAS INSTRUMENTS

September 1, 2026

To our valued customers,

We are writing to give you advance notice of upcoming price adjustments that will impact products across our portfolio. These adjustments are driven by market dynamics and rising costs throughout the supply chain. The price adjustments will vary by product, based on the specific materials, technologies and manufacturing processes involved.

As always, our goal is to be transparent with our plans. Our team will share specific details as needed. Automated price-change notifications will also be sent through your account dashboard, where you can view the most current pricing for your TI products at any time.

We greatly value your business and remain dedicated to providing you with competitive products, support, pricing and availability. Thank you for the continued collaboration.

Regards,

Mark Roberts
Senior Vice President
Worldwide Sales and Marketing
Texas Instruments

onsemi

September 16, 2026

Subject: Price Adjustment Notice – Effective October 10, 2026

Dear Valued Customer,

Thank you for your continued partnership with **onsemi**. We greatly value the trust you place in us and remain committed to supporting your long-term success with reliable supply, high-quality solutions and transparent communication.

As part of our ongoing cost review and investment planning – along with continued increases in raw material, manufacturing, energy and infrastructure costs – **onsemi** will implement price adjustments on a broad range of products, effective October 10, 2026.

Over the past several quarters, demand across multiple semiconductor application markets, particularly those supporting power, industrial and data center applications, has increased, coupled with rising input costs. To meet this demand and maintain the standards of quality, reliability and supply continuity our customers expect, **onsemi** is making additional investments in manufacturing capacity, technology, operational resilience and continued efforts to offset rising input costs.

Your **onsemi** distributor representative will provide product specific details, including impacted part numbers and applicable pricing changes. **onsemi** remains committed to collaborating closely with our customers to ensure transparency and continuity concerning this adjustment. We will continue to take forward-looking actions to support your growth in an environment characterized by evolving demand and supply constraints.

We appreciate your understanding and value our continued partnership. If you have any questions or would like to discuss the impact on your business, please contact your authorized **onsemi** distributor representative.

Sincerely,

Jon Imperato
SVP Sales and Applications

ARROW

altera

Date:
Oct 19th, 2026

Subject: January 2027 Pricing Guidance

Dear Customer,

We are writing to provide advance notice of upcoming price adjustments across portions of the Altera product portfolio.

These adjustments are driven by market conditions and rising costs across the semiconductor supply chain, including materials and manufacturing capacity. The adjustments will vary by product based on the materials, technologies, and manufacturing processes involved.

The price adjustments will be effective January 17, 2027, and will apply to open orders, quotes, and shipments on or after that date.

We remain committed to providing a broad portfolio of competitive FPGA products, dependable support, and long-term supply. We greatly value your business and appreciate your continued collaboration.

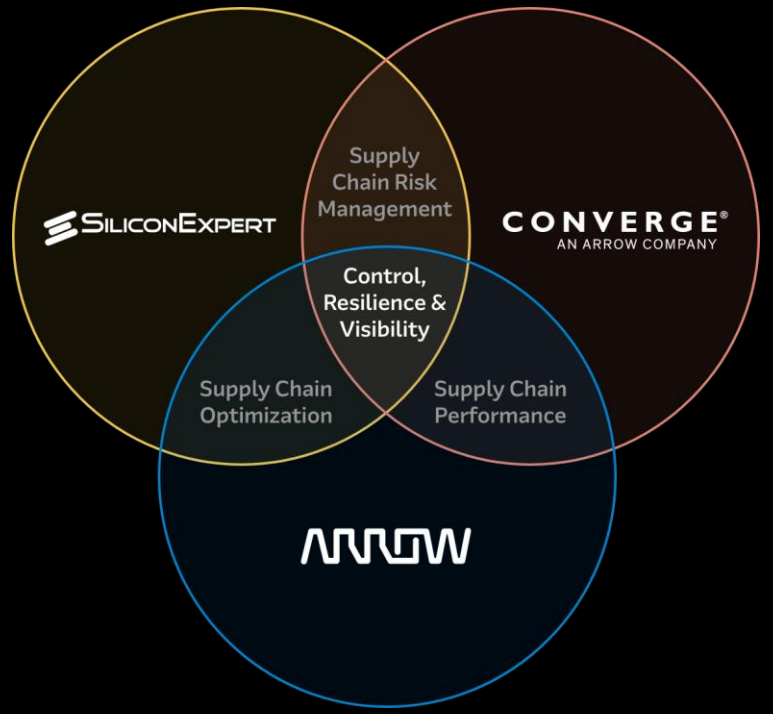
If you have any questions, please contact your Altera Sales Representative or Altera Authorized Distributor.

Sina Soltani
Senior Vice President and Head of Sales
Altera Corporation

Accelerating Innovators.

ARROW

Arrow Supply Chain



360˚ of sensing and responding

We keep a 360˚ view over what is to come and put that visibility and experience to work for you.

ARROW

Planning & Replenishment	Warehousing & inventory management	Fulfillment logistics & optimization

Register and get your FREE electronica 2026 ticket

Submit the form to receive your unique voucher code by email. Use the code to register for one free electronica 2026 ticket.

Please note:

- *Company email addresses only.*
- *One code per person, while stocks last.*
- *Voucher codes are sent within one week.*
- *Each voucher is valid for one day only, on a day of your choice.*

Industrial Ethernet Seminar

When	December 2, **Oslo** December 3, **Trondheim**
Theme	Ethernet expanding in industrial use cases
Keywords	PHYs, Switches, Bridges, Controllers, Single Pair Ethernet, T1S, T1M, PLCA, PoDL, MPoE, TSN, PTP
Take away	Which one to choose for what use-case, design considerations and challenges. Migration from legacy industrial buses
Time	09:00-16:00
Who	Embedded Designers, Hardware Engineers, Project Managers, System Architects
Cost	Free, incl lunch

REGISTER HERE

Contact: Inge Høivik, inge.hoivik@arrow.com

v 1.0 23-Oct-28

Intelligent Autonomous Vehicles Workshop in Norway

Save the date

When:	**January 19, 2027**
Where:	Scandic Lillestrøm (10 min from Oslo & airport) Stillverksveien 28, 2004 Lillestrøm
Setup:	Parallel rooms with dedicated technical focus: Hardware, Processing/Application Full day Exhibition area ~25 relevant technology providers
Time:	09:00-17:00. mingling and dinner after
Audience:	Embedded designers, Hardware designers, Software and Edge AI developers, System architects
Cost:	Free

Pre-register to get agenda when ready

Contact: Inge Hoivik, inge.hoivik@arrow.com, +47 907 20 206

v1.01 Oct 28

Five Years Out

SAVE THE DATE !

Arrow Norway Technology Day & Boat Trip
May 19, 2027
Quality Hotel Expo, Fornebu

Get ready for a day filled with innovation, collaboration, and cutting-edge technology.
Join us as we bring together over 30 leading suppliers from the component industry to showcase and present the latest products and solutions.
The event will conclude with a delightful dinner cruise in the beautiful Oslo fjord.

With more than 300 industry professionals, including customers and partners, this is an event you don't want to miss.
Mark your calendars and stay tuned for more details.
We look forward to seeing you there!

WE THANK OUR PARTNERS FOR OUR 2026 EDITION

Five Years Out