SEMI Supply Chain Management

Survey Results 2026 - Webinar

November 17th 2026

TRANSFORM TOMORROW

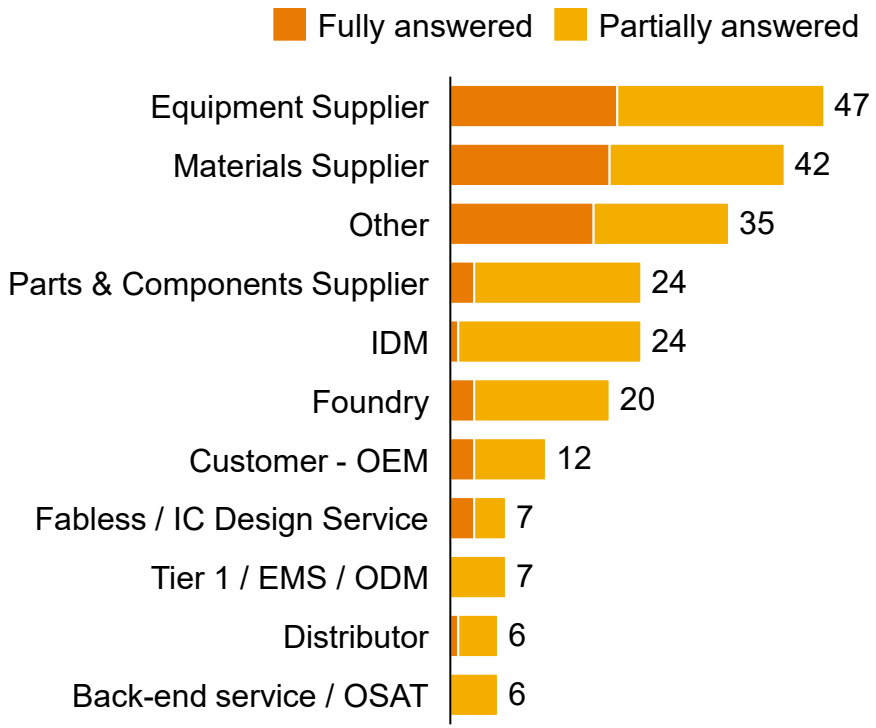
Introduction to the SEMI Semiconductor Supply Chain Survey

Since 2022 the SEMI survey has measured the operational "health" of the semiconductor supply chain

Who participated?

 # Number of respondents

200+ responses annually



What devices and supply categories were covered?

Devices

- Analog IC
- Discretes
- Logic
- Memory
- Microcomponents
- Optical Sensors & Actuators

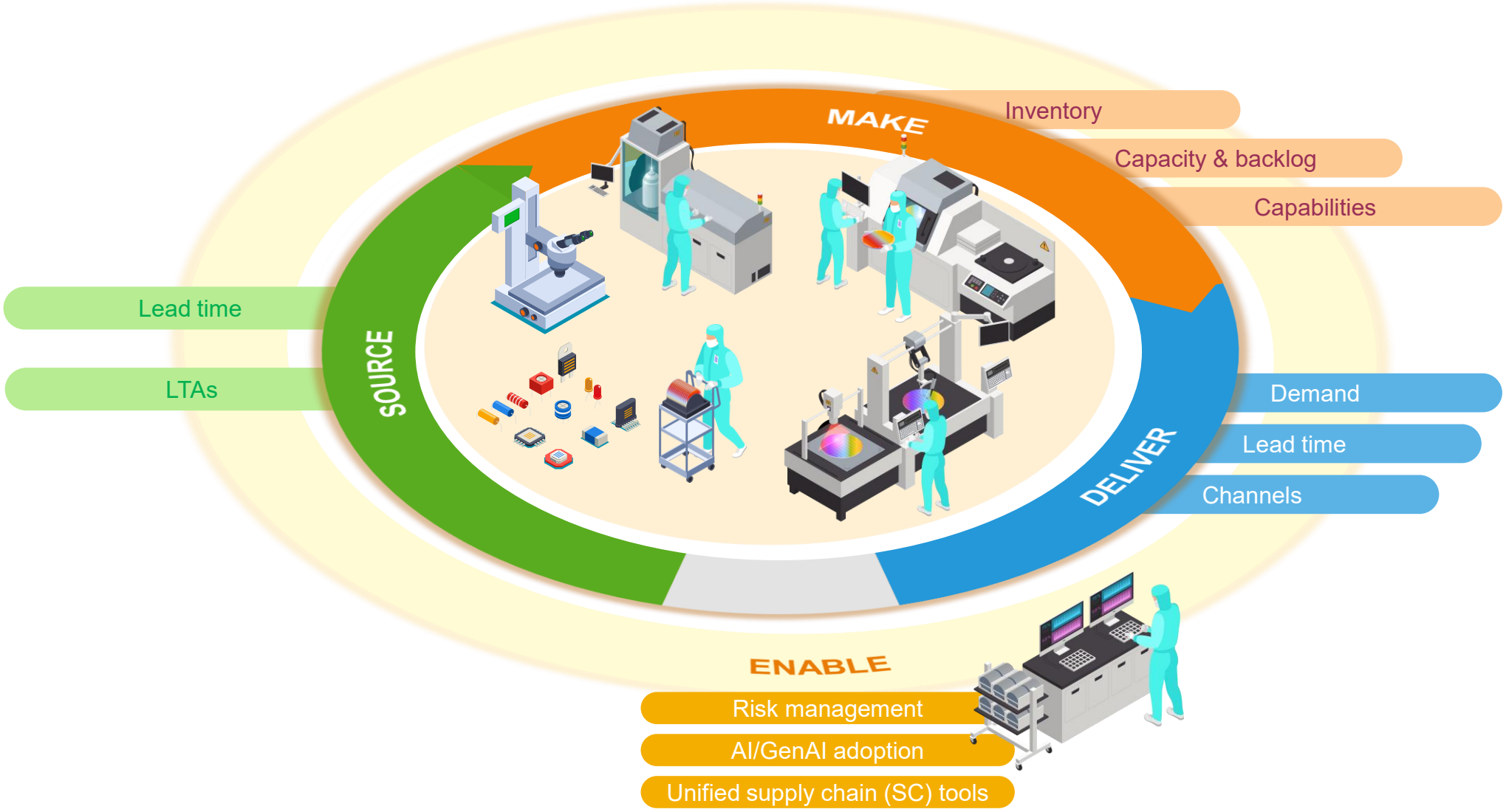
Materials

- Assembly
- Chemicals & Solids
- Flat Panel Display
- Gases
- Mask Making
- Nanotechnology
- Photovoltaics
- Process
- Substrate
- Test

Focus areas

- Customer Demand
- Production utilization
- Inventory
- Supply lead times
- Long Term Agreements (LTA)
- Supply chain risks and opportunities

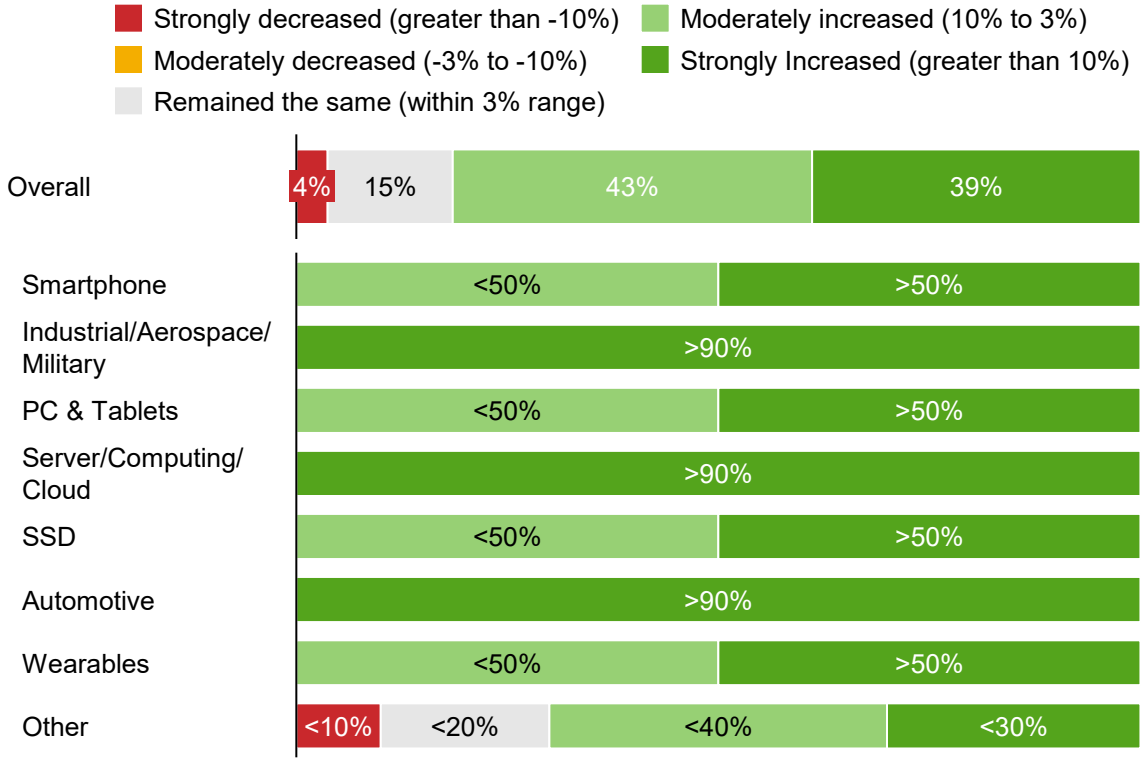
2026 Semiconductor Supply Chain Survey – Framework



Strong increases in demand across all end markets

Compared to the same quarter in the previous year, what is the change in customer demand?

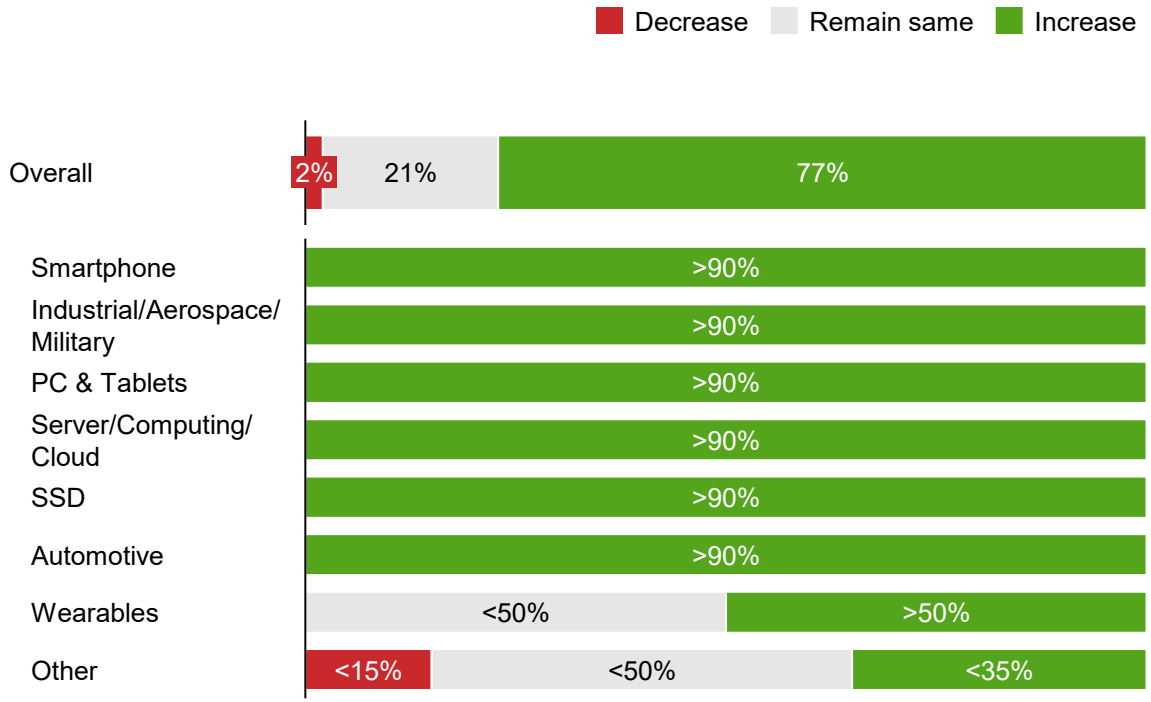
% of respondents



*In 2025, only ~27% of **end-market readings reported growth** (cloud aside); in 2026 that's jumped to nearly all — a decisive positive flip*

How do you expect demand to change in the next 6-12 months?

% of respondents

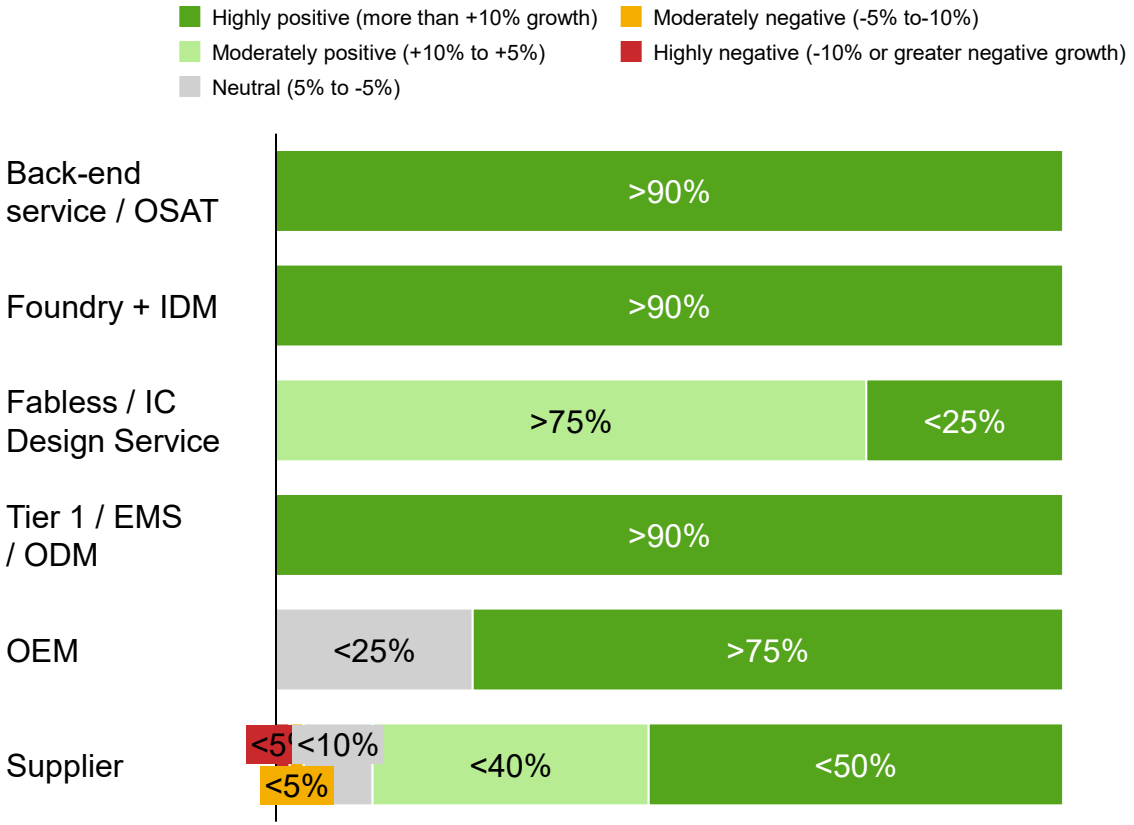


*In 2025, most expected **demand to hold flat,** with decliners outnumbering optimists; in 2026 that outlook has inverted — 77% now expect growth through end-2026, up from under 10% a year ago*

Revenue optimism is at an all-time high

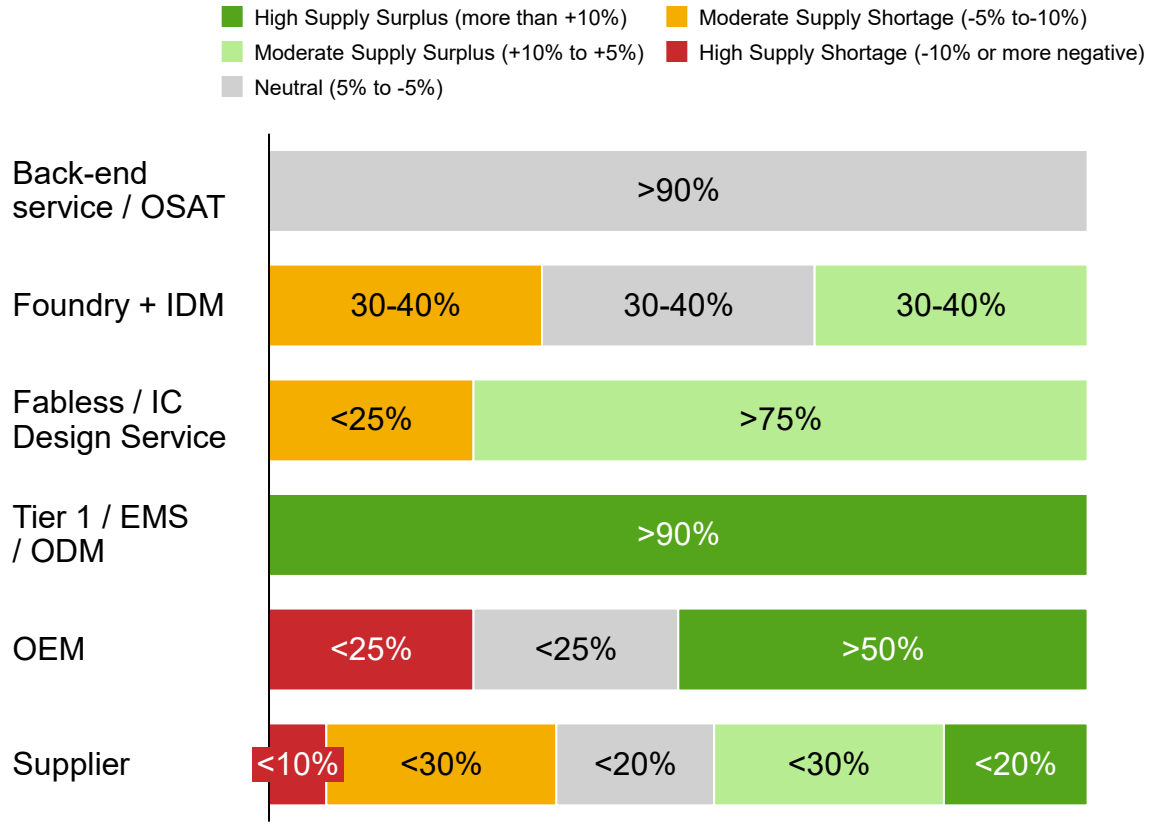
What is your view on revenue growth for the semiconductor supply chain over the next 12 months?

% of respondents



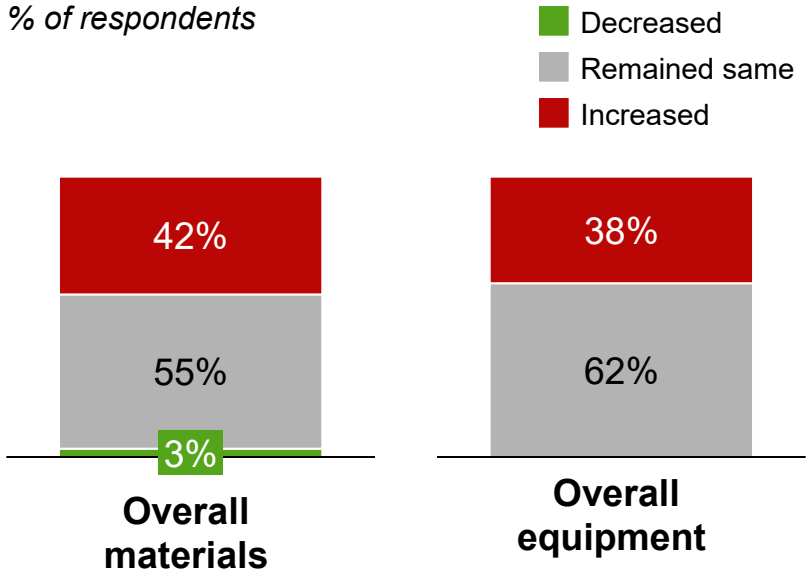
What is your view on supply/demand dynamics for the overall semiconductor supply chain for the next 12 months?

% of respondents



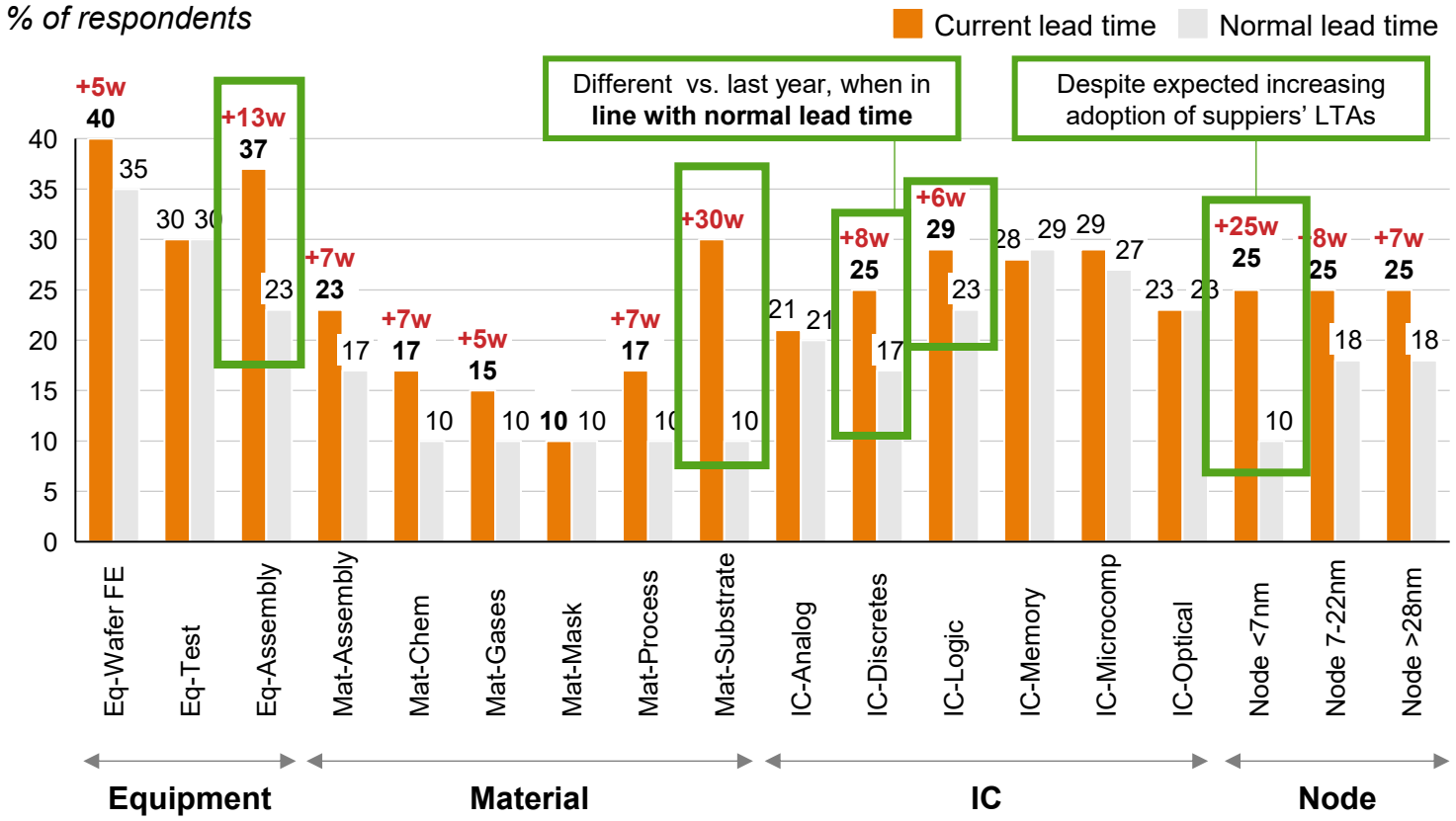
Lead times stay above normal, and ~40% expect an increase

How have lead times changed compared to last quarter?



Majority of respondents report **stable equipment lead times** quarter-over-quarter, with **38% signal an increase,** concentrated in **Assembly & Packaging equipment**

What is the current lead time vs. normal lead time (in weeks)?



LTA adoption set to rise — ~60% expect broadening coverage

Overall: Expected Change in LTA Share, % of respondents

How do you expect the average share of material purchased under LTA to change?

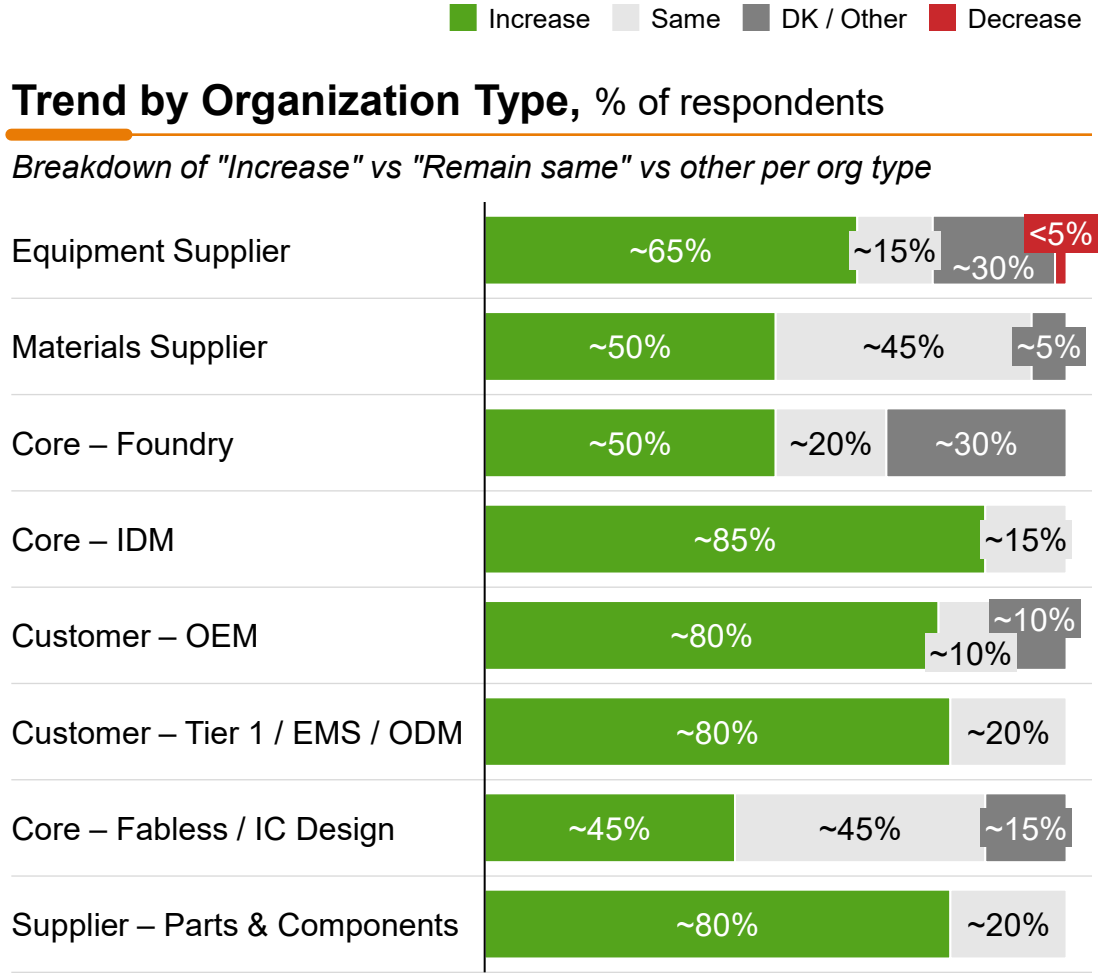


~60% expect LTA share to increase in 2027

Only <5% expect a decrease — a strongly bullish signal for LTA adoption

Trend by Organization Type, % of respondents

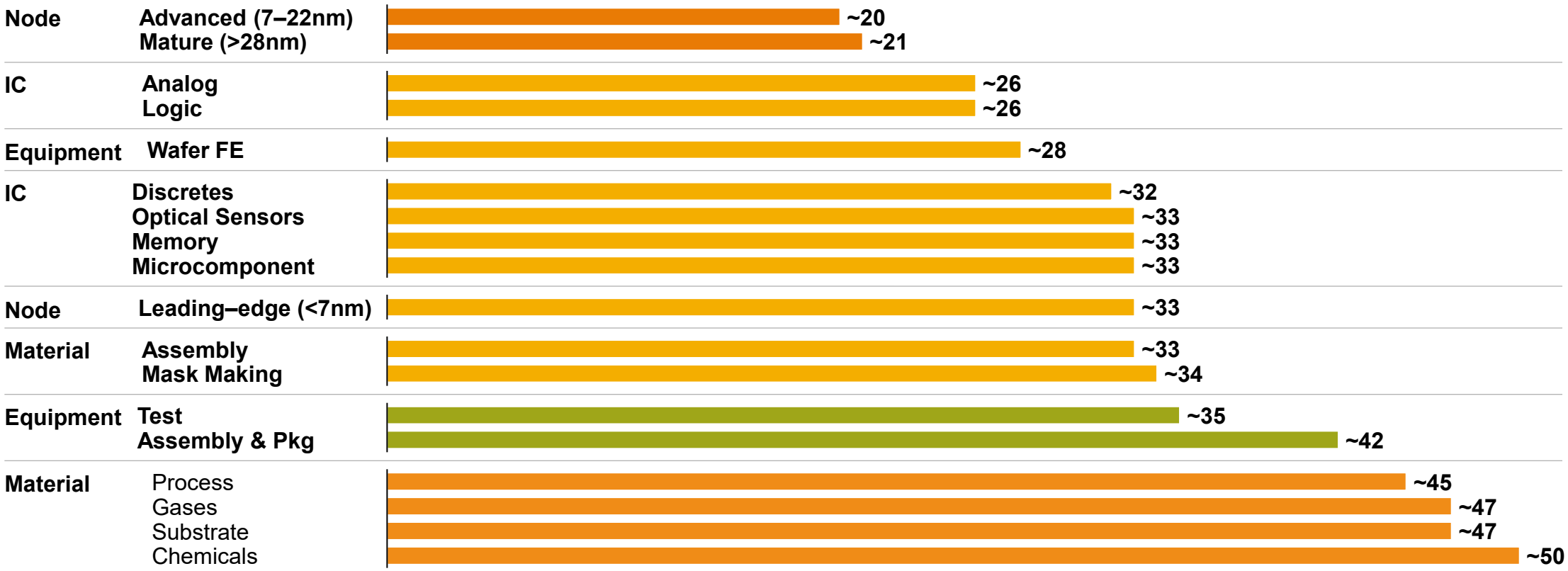
Breakdown of "Increase" vs "Remain same" vs other per org type



Materials show the highest LTA adoption (reaching ~50% for chemicals), whereas advanced/ mature node and IC analog/ logic with lowest

Avg. Estimated LTA Penetration by Category, %

Midpoint scoring: <10%→5, 10-30%→20, 31-50%→40, 51-70%→60, >70%→80 (excl. DK/N/A)

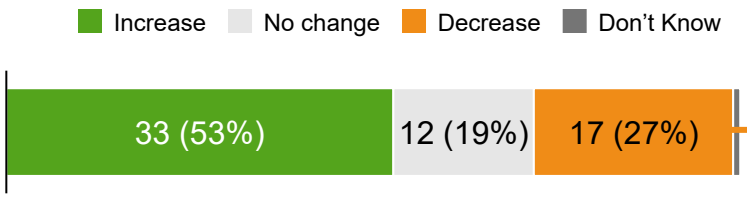


n=55 respondents

Supplier commitment is increasing vs. previous year, with capacity constraints as main root cause for suppliers not meeting expectations

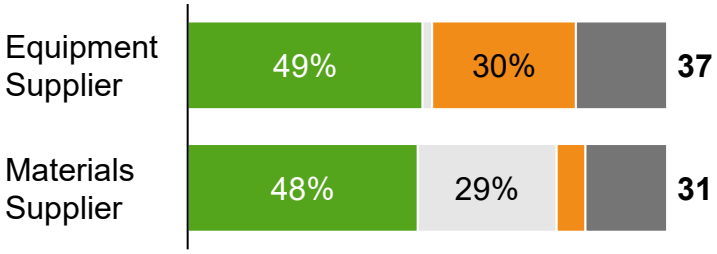
Overall Supplier Commit Trend vs. Prior Year

n=69 total – n=62 excl. Don't Know / N/A



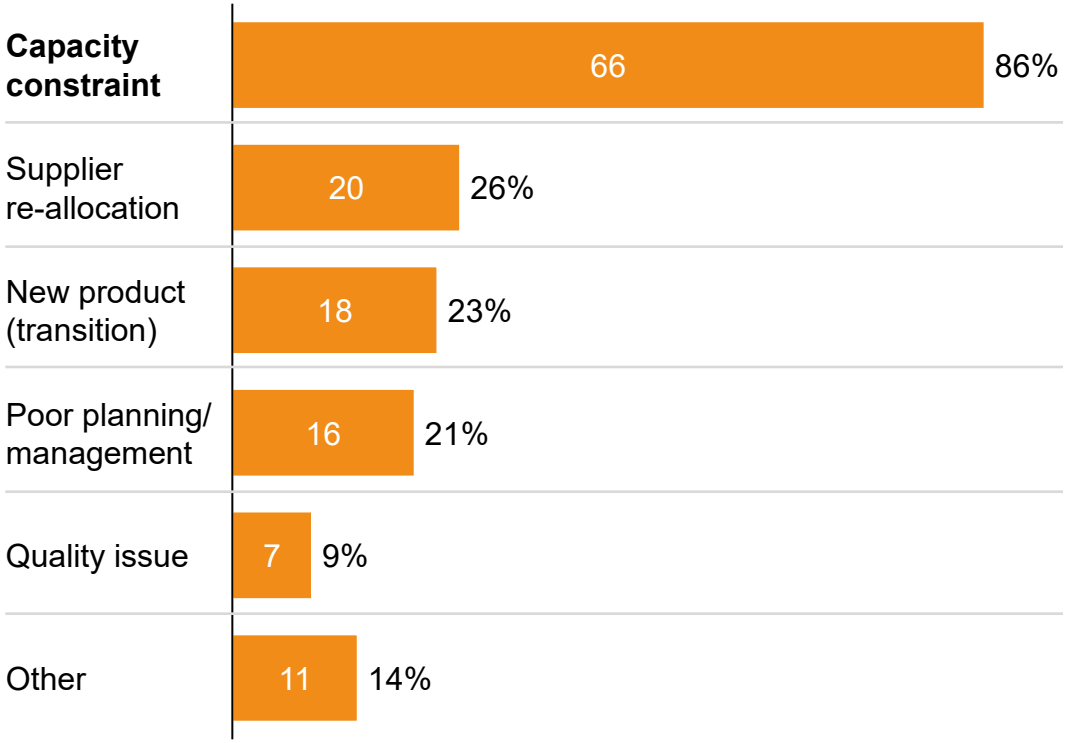
Commit Trend by Organization Type

Equipment Suppliers and Materials Suppliers drove the majority of responses



Root Cause Distribution

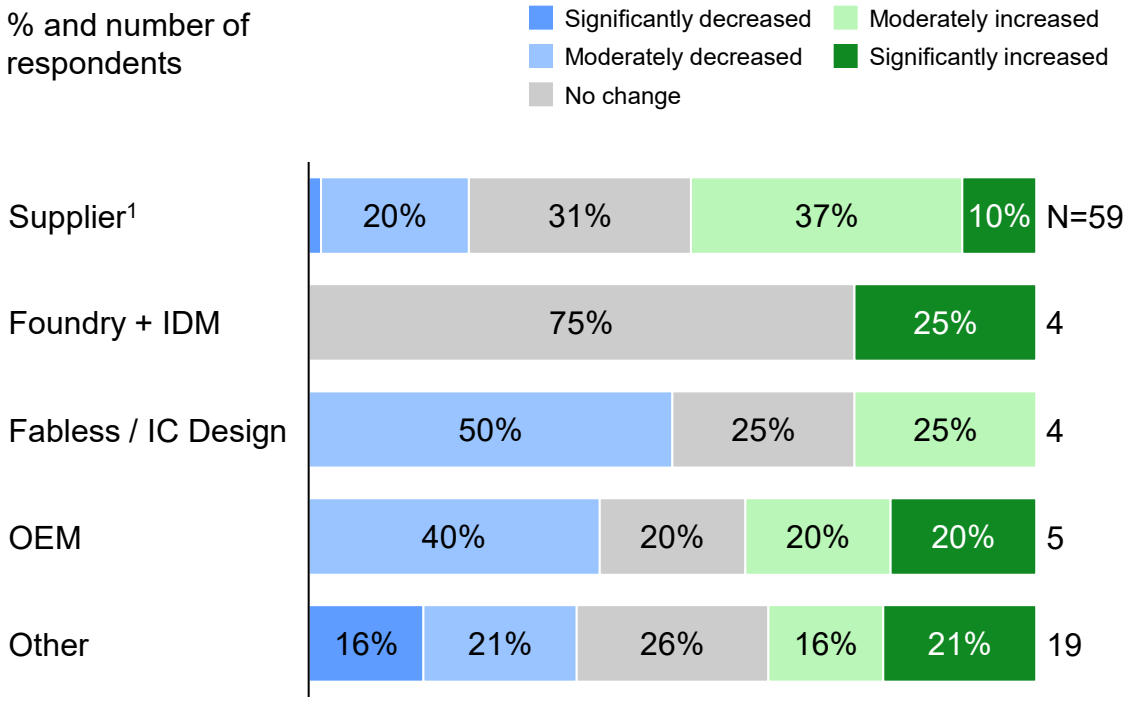
Multi-select — total mentions shown
(n=109 responses, 138 total mentions)



Input materials inventory build continues across the supply chain, with most respondents now at or above target

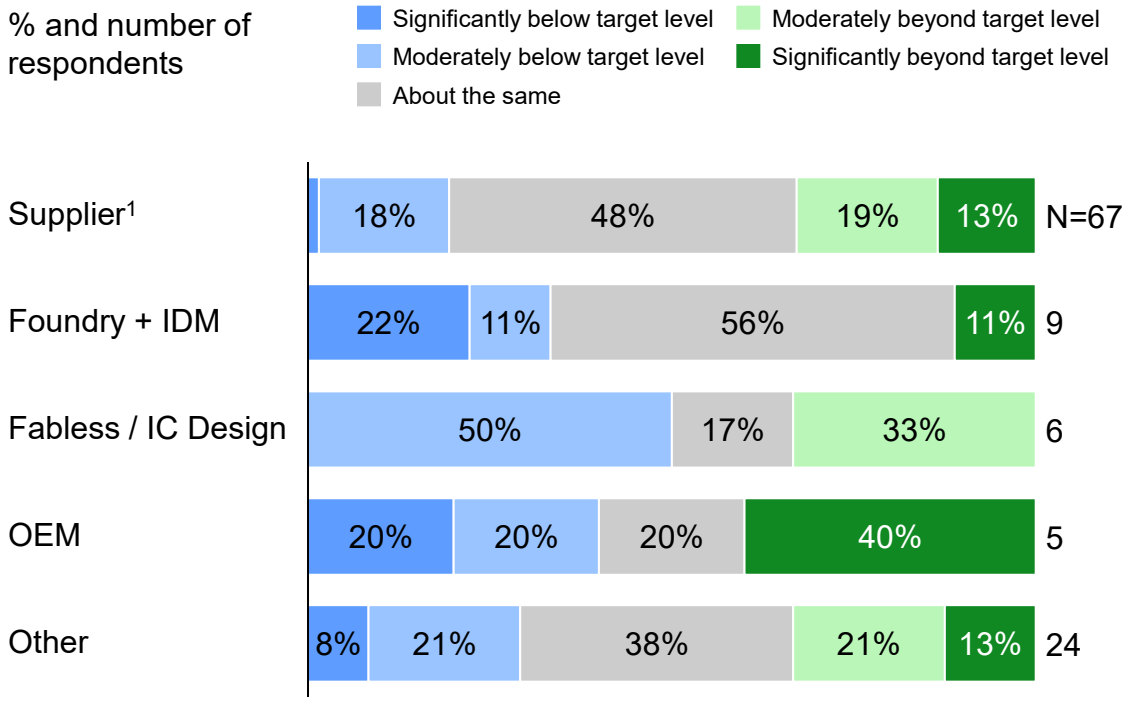
Most industry respondents report current input materials inventory at or moderately above target levels

How are your current inventory levels compared to the same quarter in the previous year?



*In 2025, inventory movements were mixed across org types — in **2026 the increase signal has strengthened,** with suppliers jumping from 25% to 47% reporting higher inventory vs. prior year and OEMs from 31% to 40%*

What is the current vs. target inventory trend in your organization?

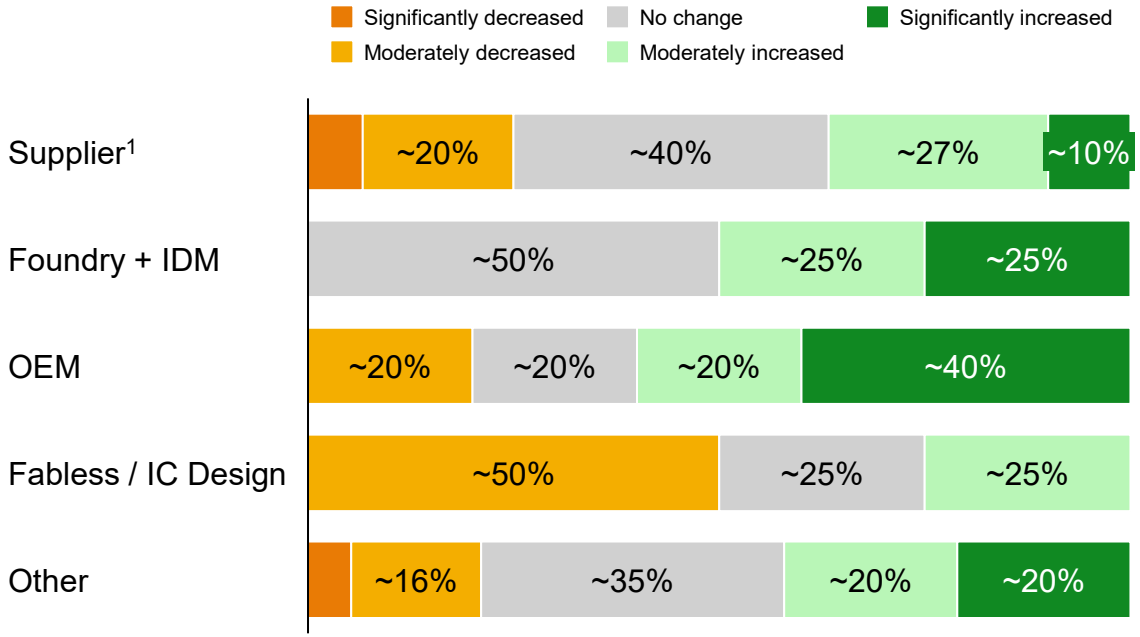


*In 2025, inventory was mixed across org types — in **2026 the beyond-target signal has strengthened further,** with OEMs the sharpest mover jumping from 36% to 40% significantly beyond target*

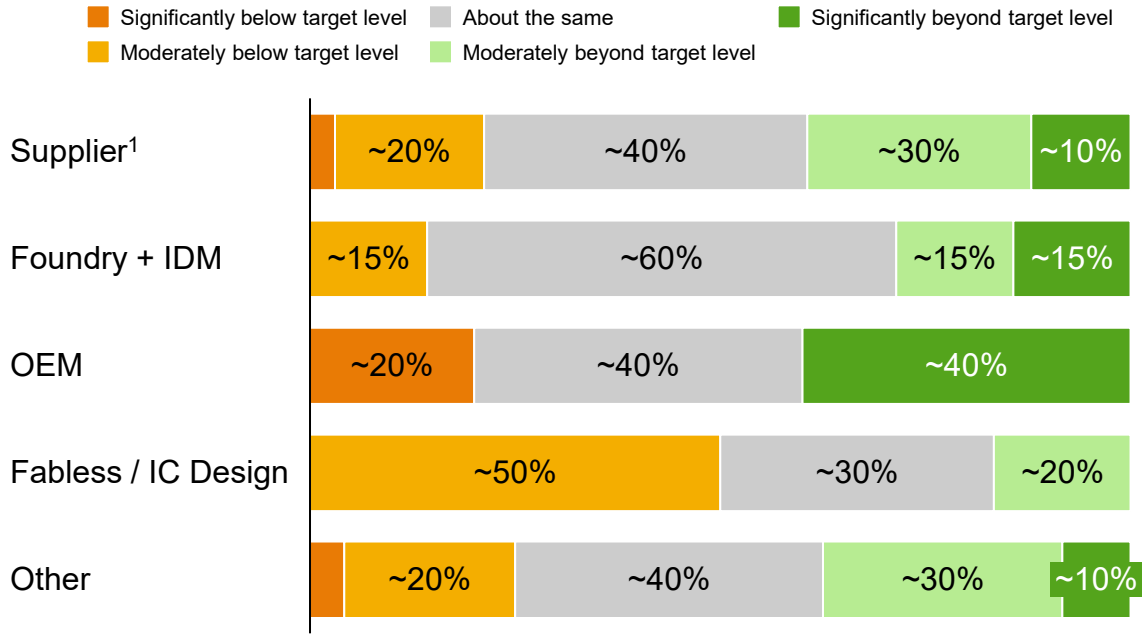
1. Consists of materials supplier, equipment supplier, and parts & components supplier

Finished goods inventories have rebuilt across the supply chain…

How are your current inventory levels compared to the same quarter in the previous year?, % of respondents



What is the current vs. target inventory trend in your organization?, % of respondents

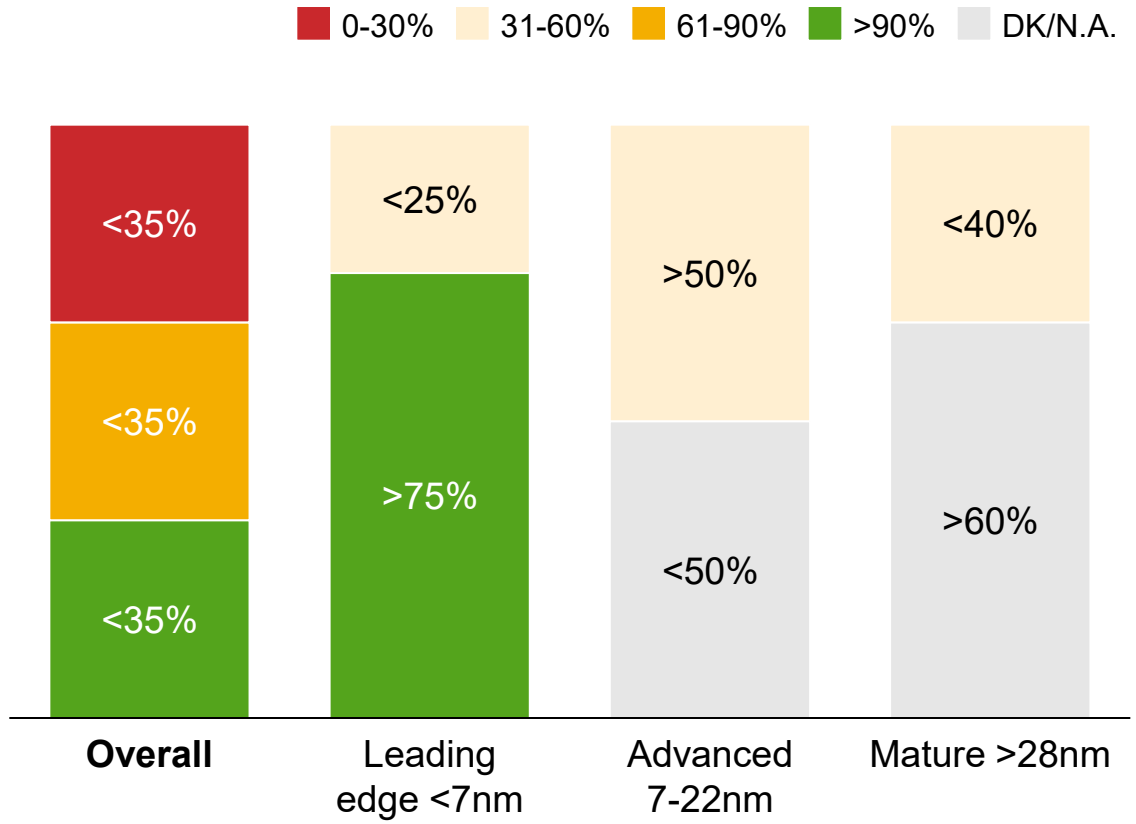


*In 2024, **nearly all players were below target** — by 2025 most had reached at-or-about target — in **2026 the shift has continued upward,** with Suppliers at ~40% beyond and OEMs at ~40% significantly beyond target*

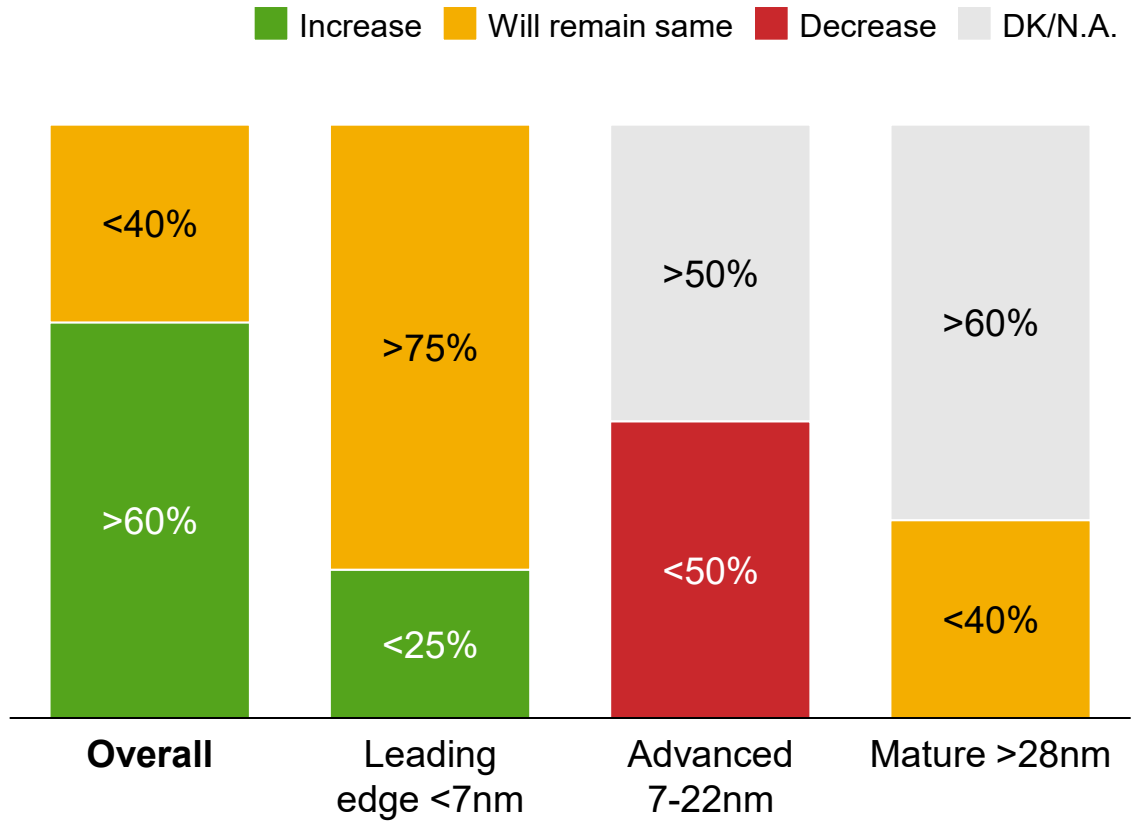
1. Consists of materials supplier, equipment supplier, and parts & components supplier

... yet apparent slack masks a sharp capacity “bifurcation”

Current production capacity utilization by node
% of respondents



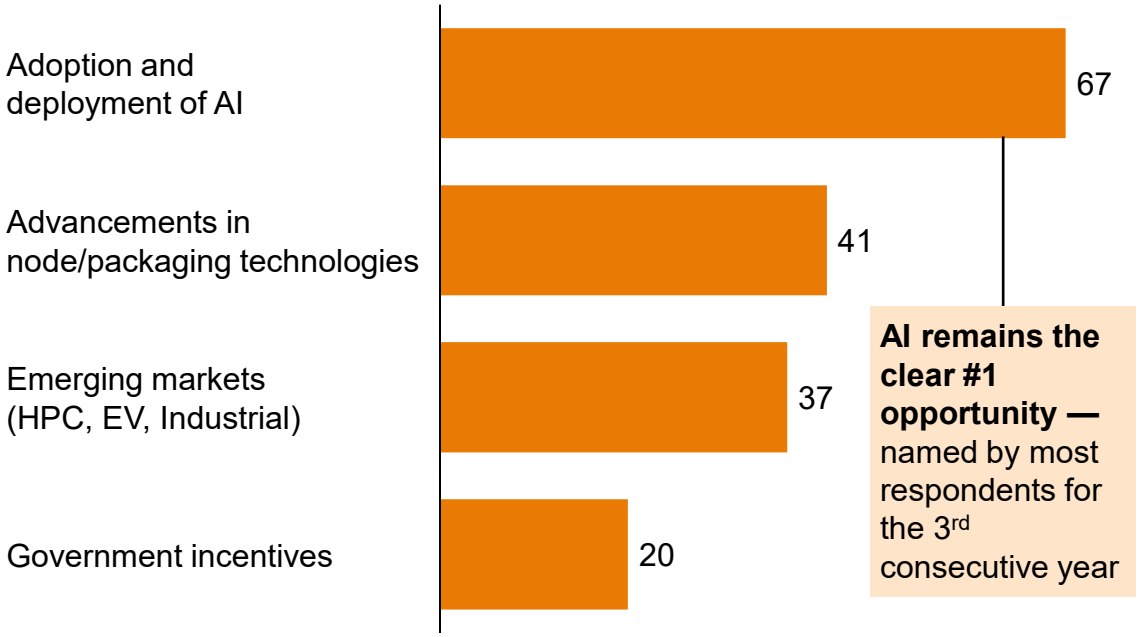
Expected utilization change – Next 1-2 quarters
% of respondents



AI biggest tailwind; geopolitics and disruptions biggest threats

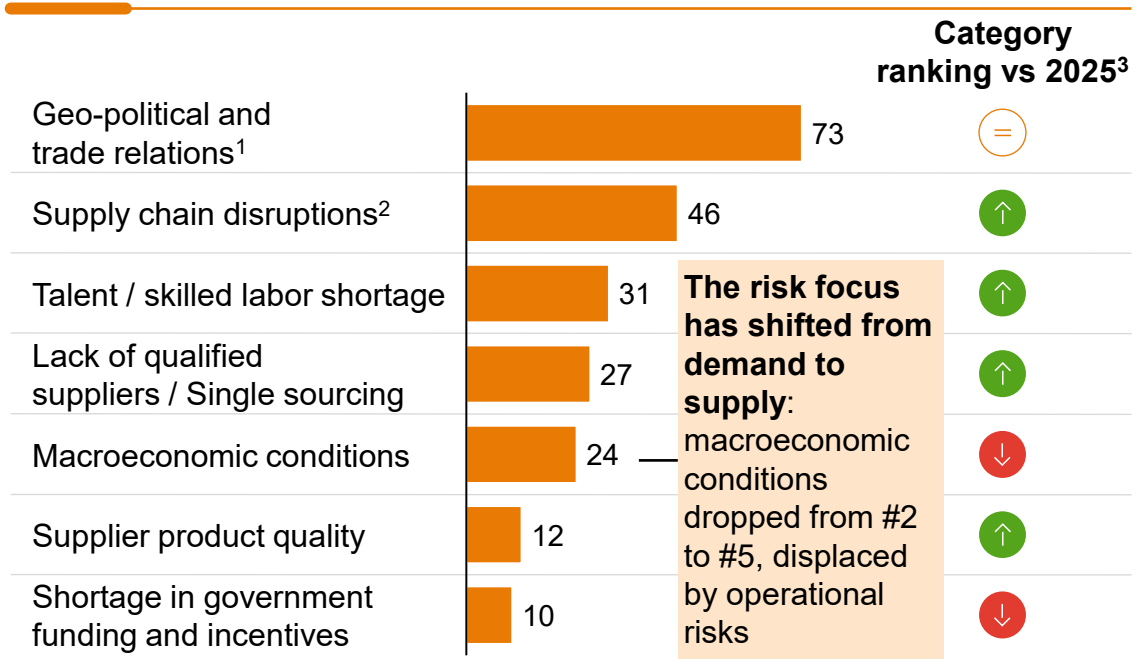
Same ranking | Moved up | Moved down

Which of the following developments do you perceive as biggest opportunity for the semiconductor supply chain in the next 12 months?
% of respondents, multiple choice allowed



AI remains the clear #1 opportunity — named by most respondents for the 3rd consecutive year

Which of the following developments do you perceive as the biggest long-term threat to your company's supply chain (beyond 6 months)?
% of respondents, multiple choice allowed

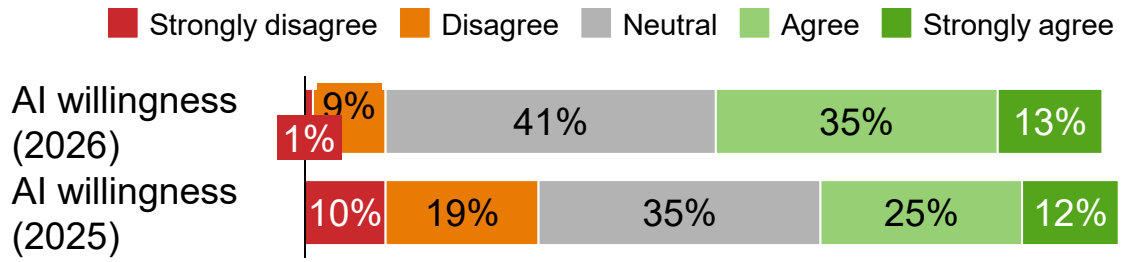


The risk focus has shifted from demand to supply: macroeconomic conditions dropped from #2 to #5, displaced by operational risks

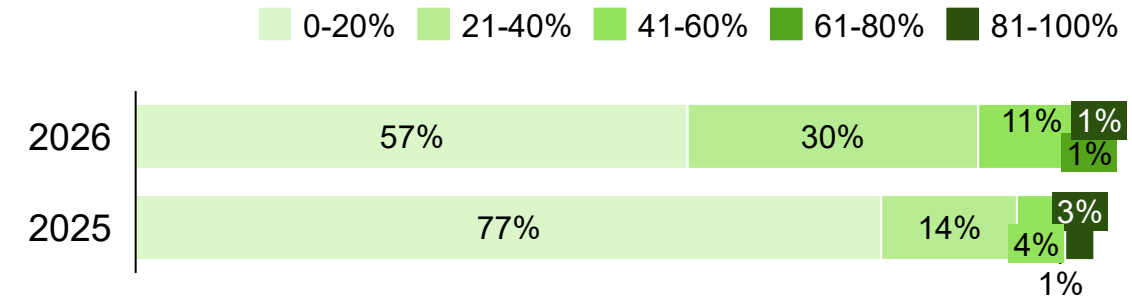
1. Political conflicts, regional war, trade restrictions/tariffs etc.
2. Natural disasters, capacity shortage, energy shortage, cybersecurity risks, etc.
3. 2026 allowed multiple selections (totals exceed 100%); 2025 was single-select. Year-over-year comparison is directional (rank order), not by percentage point

AI willingness outpaces skills, widening the execution gap

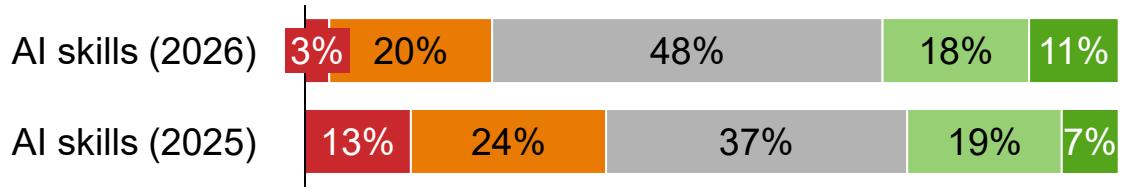
Willingness to adopt AI in the supply chain, 2026 vs 2025



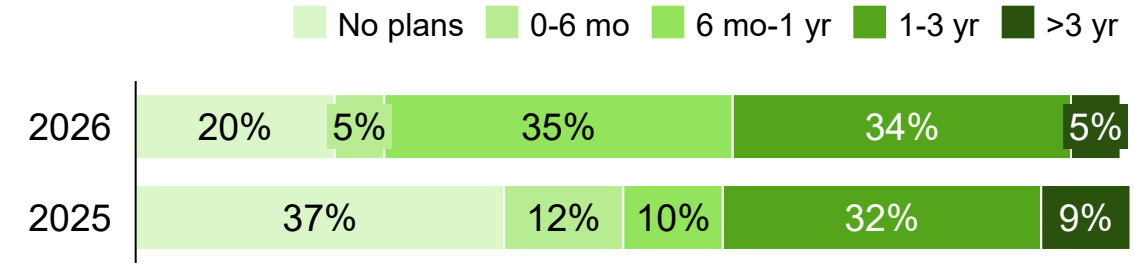
% of supply chain processes currently leveraging AI



Skills to adopt AI in the supply chain, 2026 vs 2025



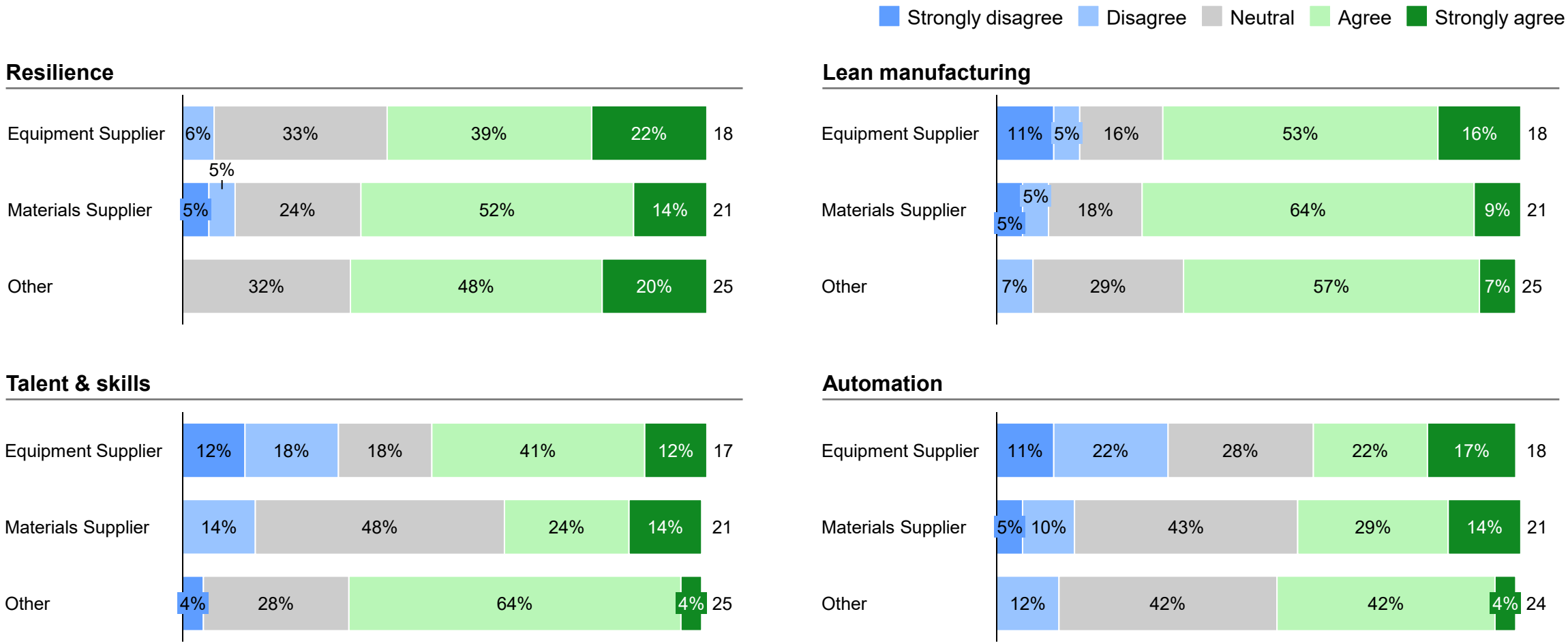
Plan to fully integrate AI into SC processes, by time-frame



Intent is accelerating — “no plan” share cut in half and willingness up — yet skills barely moved (26% to 29%) and 57% still apply GenAI to under a fifth of processes

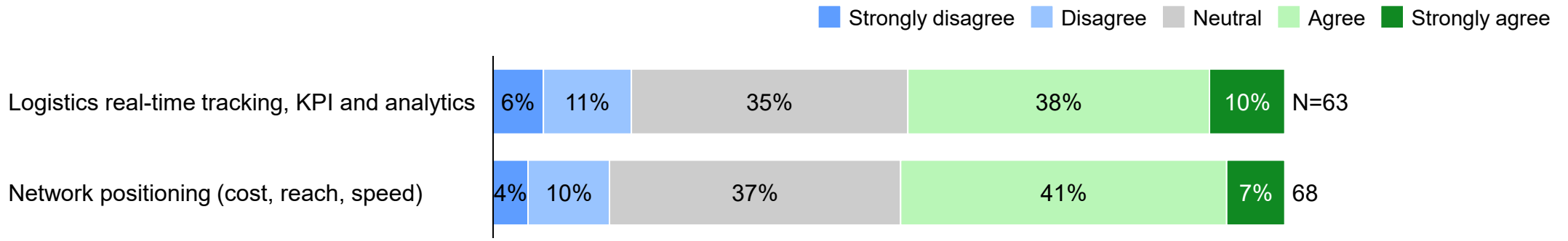
Lean and resilience are strengths, but automation remains a persistent gap with limited no org type has cracked

% of respondents. "we lead competitors on this dimension"

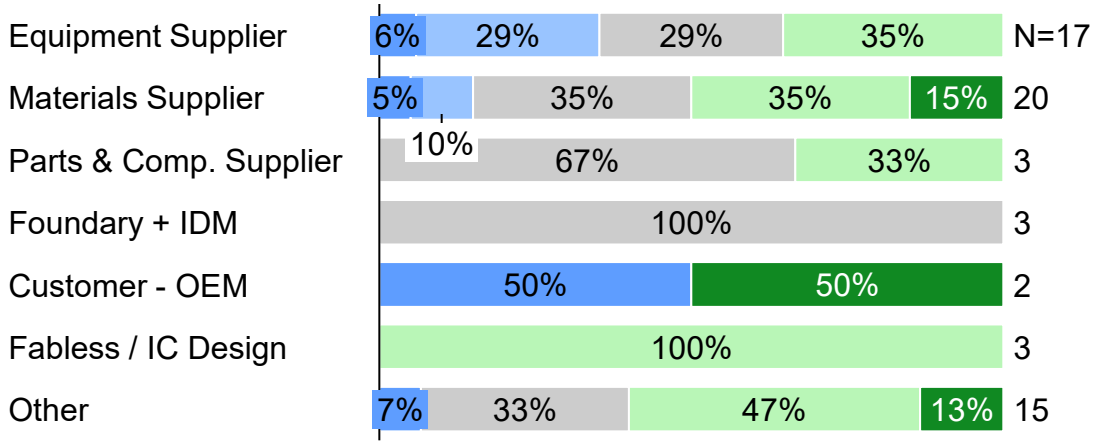


Delivery capabilities are solid but uneven, with logistics tracking and network positioning that show moderate confidence

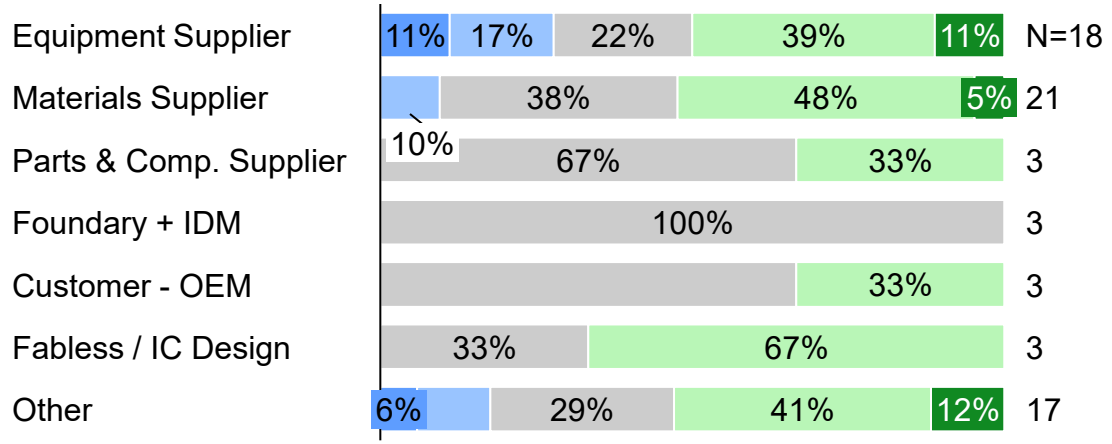
% of respondents. "we lead competitors on this dimension"



Logistics tracking

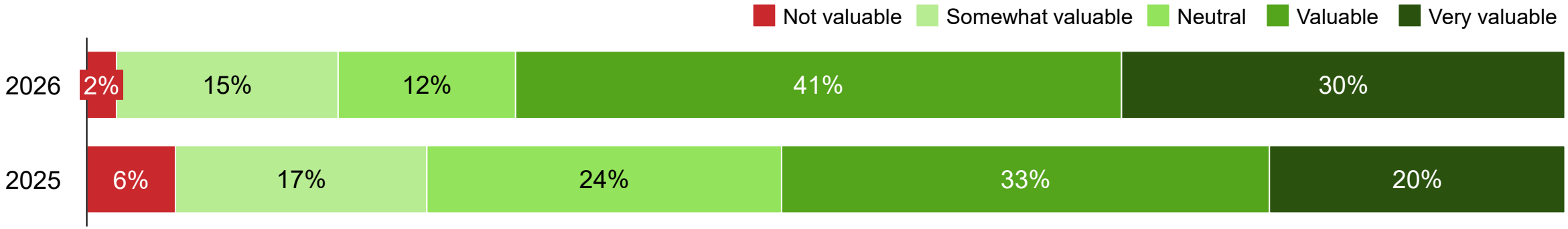


Network positioning



Continued appetite for a unified supply-chain KPI platform

How valuable would a tool consolidating diverse SC metrics/KPIs into one platform be?



How likely would you be to use such a tool to support SC decision-making? (2026 only — new question)



Demand for a single view of the chain is rising fast: valuable/very valuable up from 53% to 71%, and 65% would use one today

Key messages

Demand rebounds	**82%** report higher YoY demand, **77%** expect further growth through end-2026, and **88%** of suppliers expect revenue growth over the next 12 months
Tightness extends commitments	Equipment lead times run **5–13 weeks** above normal, sub-7nm is **+25 weeks** above normal, and **60%** expect greater LTA adoption in 2027
The supply chain bifurcates	**~40%** report above-target finished-goods inventory — while upstream, leading-edge capacity remains severely constrained with no relief in sight
AI leads; geopolitics threatens	AI remains the **#1 opportunity** at **67%**; geopolitical and trade relations are the **#1 threat** at **73%**
AI ambition outpaces readiness	No-plan share fell from **37% to 20%**, but skills moved only from **26% to 29%** — and **57%** still use GenAI on under 20% of processes