Semiconductors — Microcontrollers & Sensors — Q3 Market Brief

Brief ID: MB-2025Q3-MCUSENS • Sentiment: Positive • Updated: 2025-08-25 • Region: Global → NA • Demo dataset

Note: Demo dataset for presentation use. Values illustrative.

Executive summary

Lead times for mainstream MCUs and sensor modules continue to normalize. Pricing is competitive on high-run families; niche parts still carry premiums. For Zava's high-tech accessories, availability improves with opportunities to dual-source pin-compatible options.

Signals

Signal	Current	WoW Δ	YoY Δ	Confidence
MCU lead time (dem	12–16 weeks	-1w	-6w	High
Sensor module ASP	$3.10	-0.5%	-4.0%	Medium
Allocation status	Low	↔	↓	Medium

Drivers & risks

- Driver: Foundry capacity rebalanced to MCUs from bleeding-edge nodes
- Driver: Distributor inventories healthier; broad-market demand mixed
- Risk: Sudden design wins can whipsaw niche SKUs
- Risk: Package substitutions can invalidate certifications if unmanaged

Implications for Zava

- Accessory builds less likely to slip for silicon; buffer can be reduced modestly
- Pin-compatible alternates lower risk in seasonal ramps

Watchlist

- PCBA house cycle times around holiday peaks
- Notices on EOL/LTB for older MCU families

Recommended actions

- Approve two pin-compatible MCU alternates per board
- Move critical sensors to 13-week rolling forecasts with disti commits
- Bake in automated incoming tests for substituted packages