European Semiconductor Industry Association

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FOR IMMEDIATE RELEASE

Semiconductor market continues to accelerate in Q3 2026

The European Semiconductor Industry Association (ESIA) announced today that global semiconductor sales reached USD 517.7 billion in Q3 2026, an increase of 146.8% compared to Q3 2025.

The quarter also recorded the highest quarter-on-quarter growth rate observed in 2026, confirming the continued acceleration of the global semiconductor market, in line with the latest World Semiconductor Trade Statistics (WSTS) forecast. European semiconductor sales followed the global upward trend, reaching USD 28.6 billion in Q3 2026, up 102.5% year on year. These figures are based on the latest WSTS report. The growth figures continue to be strongly influenced by investments in AI data centres.

Looking at other regions worldwide, the Americas recorded the highest year-on-year semiconductor sales growth in Q3 2026, with an increase of 191.7%, followed by Asia-Pacific (141.4%), and China (124.9%).

In quarter-on-quarter terms, global semiconductor sales increased by 24.1% in Q3 2026 compared with Q2 2026. Europe recorded a similar increase with semiconductor sales rising by 22.5% over the same period.

The main drivers of global semiconductor sales growth year on year in Q3 2026 were strong increases across most product categories, particularly Memory (up 405.7%), Logic (up 61.9%), and Microcomponents (up 26.6%). A similar trend was observed in the European semiconductor market, where the biggest growth drivers were Memory (up 392.2%), Logic (up 55.6%), and Microcomponents (up 42.4%).

It should be emphasised that the spectacular growth in Memory sales, both globally and in Europe, continues to be largely driven by strong demand for AI data centres and AI infrastructure as well as significant price increases.

Global sales of application-specific chips increased by 53.5% year-on-year in Q3 2026, driven primarily by strong demand in the computer segment. European sales of application-specific chips also recorded strong growth, increasing by 38.5% year-on-year.

In Q3 2026 overall, due to exchange rates effects, European sales amounted EUR 24.8 billion, a 105.9% increase versus Q3 2025 sales level. Sales for Q3 2026 were 23.8% higher than in Q2 2026.

To find out how to subscribe to **WSTS reports** on semiconductor sales data, click here.

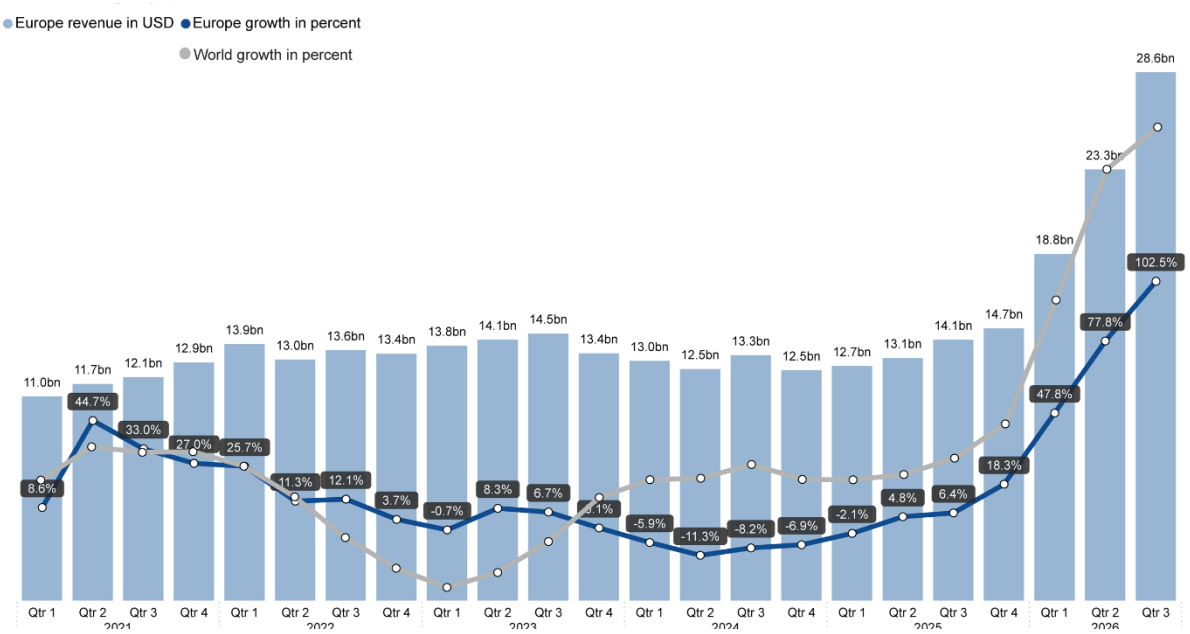
Rue de la Duchesse 11-13
1150 Brussels
Belgium
Tel.: +32 2 290 36 60
secretariat@eusemiconductors.eu
www.eusemiconductors.eu/esia

ESIA is an industry association under the umbrella of
EECA: European Electronic Component Manufacturers' Association
EU Transparency Registry: 22092908193-23

Quarterly semiconductor sales overview

Region	Sales (in billions)		Quarter to Quarter growth in %	Year on Year growth in %
	Q3 2026	Q1-Q3 2026	Q3 2026 vs. Q2 2026	Q3 2026 vs. G3 2025
in USD:				
Europe	28.6	70.7	22.5%	102.5%
Americas	196.7	452.3	30.5%	191.7%
Japan	19.8	47.4	29.0%	73.4%
China	127.7	321.2	14.6%	124.9%
Asia-Pacific	144.9	349.5	24.4%	141.4%
World	517.7	1,241.2	24.1%	146.8%
In EUR:				
Europe	24.8	61.0	23.8%	105.9%

Historic billings by quarter



For further information:

Giovanni Corder
Deputy Director-General
Senior Director Global Policy

Monika Drążek

Vincent Carrot
WSTS Europe Vice-Chair

ABOUT ESIA

The European Semiconductor Industry Association (ESIA) is the voice of the semiconductor industry in Europe. Its mission is to represent and promote the common interests of the Europe-based semiconductor industry towards the European institutions and stakeholders in order to ensure a sustainable business environment and foster its global competitiveness. As a provider of key enabling technologies, the industry creates innovative solutions for industrial development, contributing to economic growth and responding to major societal challenges. Being ranked as one of the most R&D-intensive sectors by the European Commission, the European semiconductor ecosystem supports approx. 200.000 jobs directly and up to 1.000.000 jobs indirectly in systems, applications and services in Europe. Overall, micro- and nano-electronics enable the generation of at least 10% of GDP in Europe and the world.