

EZASSI SIGNALS

Your market, watched.

Name the competitor, technology or regulation that could change your plans. Ezassi Signals tells you what's shifting, how sure we are, and what to do about it — written up and ready to act on, not another feed to read.

2+

independent events behind every signal. One headline is a report, not a signal.

3

confidence bands — with the missing evidence named when a call sits below High.

7

signals from a single cycle on hardware capacity and trade rules. One is on the next page.

WHAT EVERY SIGNAL GIVES YOU

What we saw

The pattern, built from dated events you can check — not a single press release.

Why it matters

What it means for your products, customers and markets, written against your scope.

How sure we are

High, Medium or Low. And Inconclusive when the evidence doesn't support a call yet.

What to do

A recommended action, so the signal ends in a decision rather than a reading list.

POINT IT AT ANYTHING

Competitor

Where a rival is moving next

Startup

When a new entrant becomes real

Commercial

Whether a technology is taking hold

Research

Whether the science is advancing

Regulatory

What's changing, and when it bites

Not a tool you have to run. The work, done.

Patterns found, weighed and written up against your business — and re-tested every cycle, so a call that stops holding gets re-scored instead of quietly dropped.

Electrical equipment lead times are still getting worse, not better.

HIGH CONFIDENCE

Immediate (0–3 months)

Infrastructure & Supply Chain

Status: Review

WEEKS

160+

reported lead time for generator step-up transformers in Q1 2026 — over three years out

WEEKS

125

for high-voltage circuit breakers in H2 2025, against 77 weeks in 2023

MONTHS

6–10

for cooling distribution units in the 1–3 MW range, as the scarcity spreads to liquid cooling

How sure: High on direction, not on the exact figures. Several week counts come from lead-time monitors and trade reporting that could not be independently confirmed — quote them as reported.

WHAT WE SAW

A lead-time monitor, a separate index and Reuters reporting all point the same way: switchgear, transformers, cooling distribution units and heat exchangers are far beyond normal cycles, several categories worsening.

WHY IT MATTERS

Scarcity is real, so capacity being added now is chasing genuine demand rather than a forecast. The risk runs the other way: the first sustained shortening in lead times is the earliest sign the premium window is closing.

WHAT TO DO

Track lead times monthly across the major categories, with at least one distributor backlog disclosure alongside them, and treat a four-week directional move as an escalation — in either direction.

Sources: [Open Factory — lead-time monitor](#) · [Vawn — electrical equipment lead times](#) · [SAVRN — data center supply chain](#) · [BuilderMUSE — data center permits](#)

This is 1 of 7 signals from one cycle.

The other six cover plants that moved past announcement, Section 232 reaching power and cooling inputs, the crowding cooling-distribution field, Southeast Asia's manufacturing base, machine-tool orders up 55%, and the content rules attached to US incentives.

[See all 7 signals →](#)

Put a watch on your question.

See all nine samples and tell us your question: ezassi.com/ezassi-signals-sample-library

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