

ECIA's December Industry Pulse Highlights Restored Sales Confidence in the Electronics Component Industry

ECIA's Industry Pulse: Electronic Component Trends and Sentiment December 2025

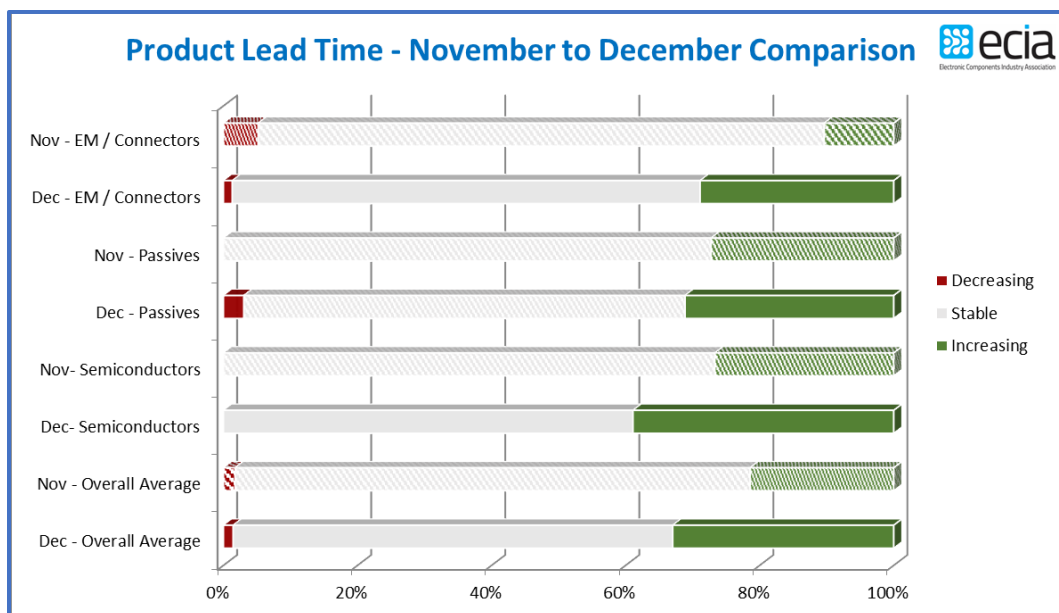
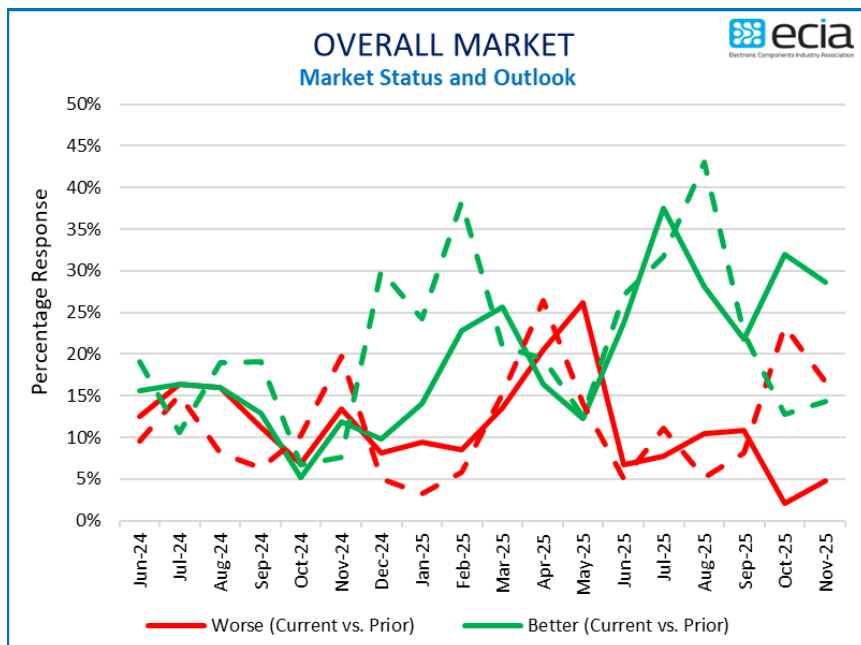
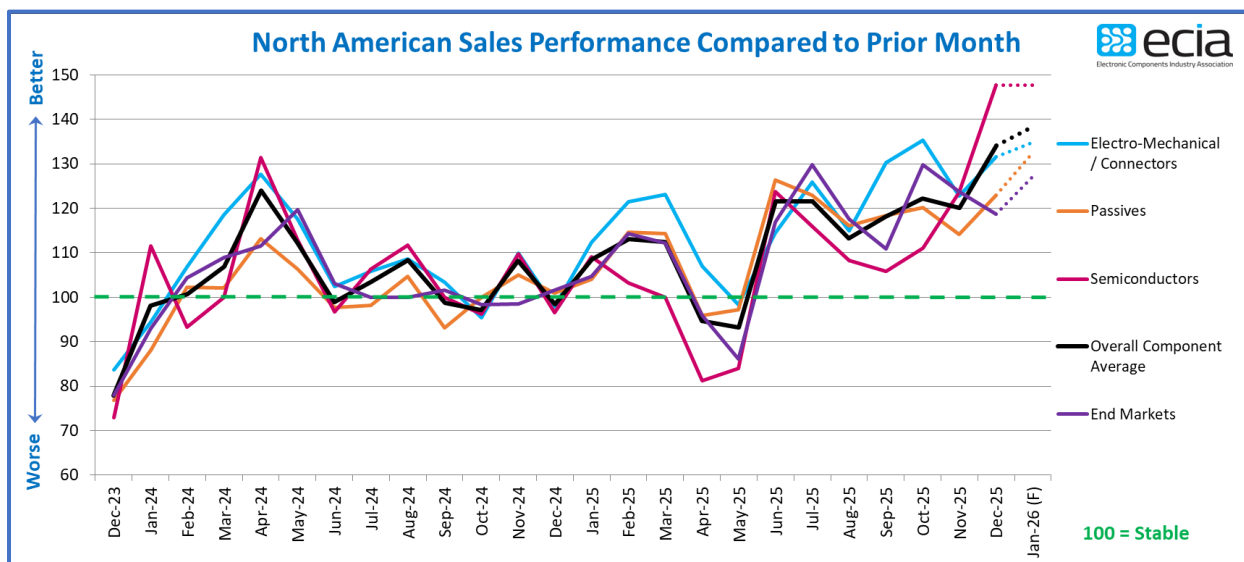
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The latest results from ECIA's Industry Pulse survey delivered highly encouraging results as we move into early 2026. The two prior surveys followed a disturbing pattern where survey participants reported strong confidence in the current month, followed by a complete collapse in sales expectations for the following month. The December Industry Pulse survey results break strongly from this plague of self-doubt and show renewed confidence as we enter the new year. With an overall index score of 134.0, the December sales sentiment results trounced expectations by nearly 33 points. The best part of the December survey is the increase in overall sentiment by over 4 points, up to 138.3. The second half of 2025 delivered the most encouraging survey results for sales sentiment in over three years. The overall average index score between June and December 2025 was 121.5.

The positive results in the December Industry Pulse survey are broad-based, with all three major product markets achieving robust gains in sales sentiment compared to November. The rise in sentiment in the Semiconductor market was meteoric as it leapt by over 24 points to 147.6. This assessment is sustained in the January outlook. This confidence aligns with the Fall 2025 semiconductor forecast from WSTS. Following a typical pattern, the WSTS forecast would show a decline in the market in the coming year. However, WSTS delivered a bold forecast predicting improved growth in 2026 with projected worldwide growth of 26.3% in 2026 compared to 22.5% estimated growth for 2025. Even more encouraging is the forecast for mid-single-digit growth in semiconductor categories outside of Memory ICs and Logic Application Specific ICs. These other semiconductor categories - Analog ICs, Microcomponents, Discretes, Optical, and Sensors - have floundered in recent years. Their projected return to growth is highly encouraging. Electro-Mechanical and Passive Components survey results showed solid improvement in December, with expectations of continued sales strength in January. The overall end-market survey results come in weaker than the product sales sentiment scores. However, the end-market assessment is still strong with a score of 118.8 in December. Every end-market category has scored above the 100-point threshold for the past three months. Only consumer electronics falters in the January outlook.

The January forecast from the December Industry Pulse survey aligns with the Q1 2026 forecast from the Quarterly Industry Pulse survey. Over 70% of survey participants in that survey project positive sales growth in Q1 2026. It is worth noting that these expectations are consistent with the dominant view of Management, CEOs, and Analysts covering electronics component, distributor, and OEM companies, as reported in the latest quarterly earnings calls for Q3.

Pressure continues to build on lead times in all three of the major component segments. Overall, 33% of survey participants report increasing lead time pressure in December compared to 21% in November. There are almost no reports of decreasing lead times. Not surprisingly, the reports of increasing lead times are particularly high in the DRAM and NAND Flash categories at 80%. Reports of increasing lead times range from 44% to 58% in other semiconductor categories. These results align with the survey results of strong sales sentiment in ECIA's December Industry Pulse.



The ECST survey provides highly valuable and detailed visibility on industry expectations in the near-term through the monthly and quarterly surveys. This “immediate” perspective is helpful to participants up and down the electronics components supply chain. In the long-term, ECIA shares in the optimism for the future as the continued introduction and market adoption of exciting innovative technologies should motivate both corporate and consumer demand for next-generation products over the long term.

The complete ECIA Electronic Component Sales Trends (ECST) Report is delivered to all ECIA members as well as others who participate in the survey. All participants in the electronics component supply chain are invited and encouraged to participate in the report so they can see the highly valuable insights provided by the ECST report. The return on a small investment of time is enormous!

The monthly and quarterly ECST reports present data in detailed tables and figures with multiple perspectives and covering current sales expectations, sales outlook, product cancellations, product decommits and product lead times. The data is presented at a detailed level for six major electronic component categories, six semiconductor subcategories and eight end markets. Also, survey results are segmented by aggregated responses from manufacturers, distributors, and manufacturer representatives.