Strong Sales Confidence Reported by ECIA's January Industry Pulse Survey on the Electronics Component Industry

ECIA's Industry Pulse: Electronic Component Trends and Sentiment January 2026

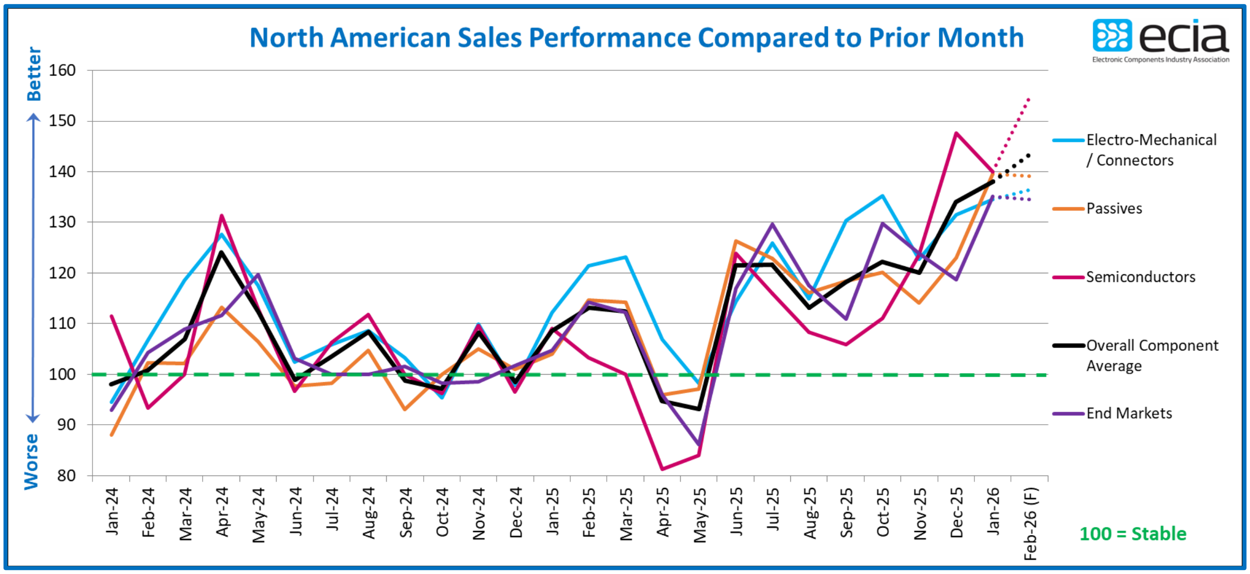
Dale Ford, Chief Analyst

The ECIA Industry Pulse survey to start 2026 delivered the strongest results in over 4.5 years. The overall average index score for sales sentiment hit 138.0 in January and is projected to reach 143.4 in February. The only time the survey has delivered results stronger than the most recent survey was in the March through May 2021 survey period. January's result also delivers the eighth straight month with overall results above 110. (100 points is the threshold between positive and negative sales sentiment.) It is very encouraging to see the authorized supply chain participants' self-image so positive as we begin a new year!

Despite a drop in the index score of 7.6 points between December and January, the Semiconductor category led among the three major segments with a score of 140.0. With a surge of 16.7 points over the prior month, Passive components nearly matched the Semiconductor score with an average of 139.6. The Electro-Mechanical / Connectors category achieved a modest improvement to reach a score of 134.5. According to survey participants, the Electro-Mechanical and Passive categories are expected to sustain their strong sales sentiment heading into February, with only minor changes in sentiment. Semiconductors are projected to deliver amazing improvement in sales strength in February, with a leap all the way to 154.5 for its overall index score. As expected, the results for Memory ICs are record-breaking at 180 for January and the February outlook. The weakest semiconductor segments are MCU/MPU and Analog/Linear ICs. However, both of these segments deliver survey results between 120 and 140. Manufacturer Representatives delivered the strongest scores for sales sentiment, followed by Distributors. Even though Manufacturers were much more conservative in their opinions, they still reported solid results. Every category for every group in the supply chain achieved scores at or above 100 for January and the February outlook.

The overall end-market survey results saw a robust improvement in January to achieve alignment with the product scores. The overall score for end-markets in January was 135.1 and is expected to remain fairly constant in February. Every end-market delivers strong 100+ scores in both January and February lead by continuing optimism in the Avionics/Military/Space and Industrial segments.

Lead time pressure continues to increase based on the reports from survey participants. Over half of survey participants report increasing lead times for Semiconductors. Overall, nearly 40% of respondents report increasing lead times while only 8% see decreasing lead times. As expected, DRAM and NAND Flash are experiencing the greatest pressure, with 75% and 67% of participants, respectively, reporting increased lead times. The severe mismatch between supply and demand for advanced memory ICs presents one of the greatest concerns for the overall health of the electronics components market. Limited supplies of these components could result in stalled sales in other segments. This has emerged as one of the most critical areas of supply chain management heading into 2026.



North American Sales Performance Compared to Prior Month
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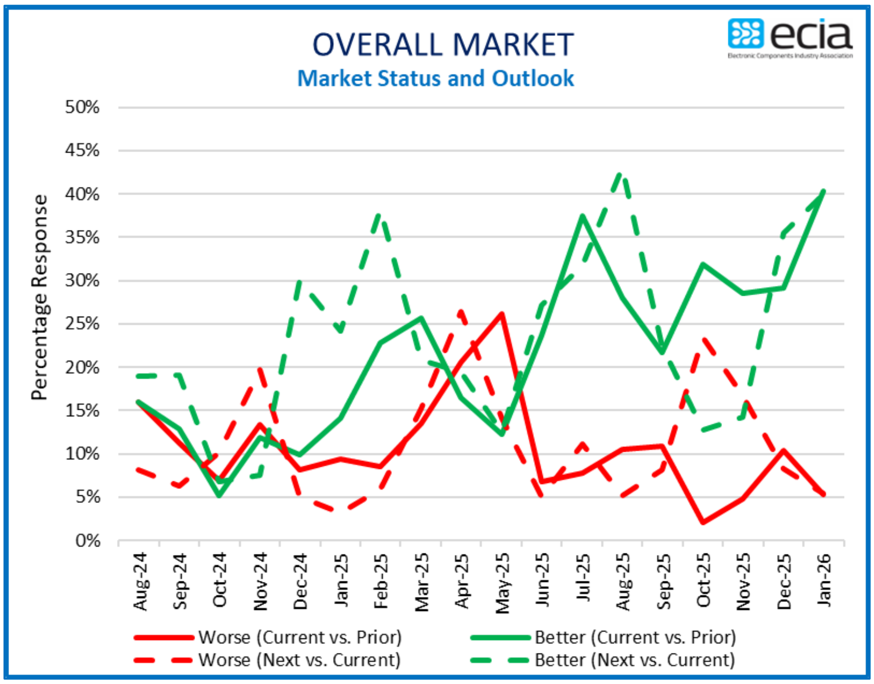
Electronic Components Industry Association
Better
Worse
160
150
140
130
120
110
100
90
80
Jan-24
Feb-24
Mar-24
Apr-24
May-24
Jun-24
Jul-24
Aug-24
Sep-24
Oct-24
Nov-24
Dec-24
Jan-25
Feb-25
Mar-25
Apr-25
May-25
Jun-25
Jul-25
Aug-25
Sep-25
Oct-25
Nov-25
Dec-25
Jan-26
Feb-26 (F)
Electro-Mechanical / Connectors
Passives
Semiconductors
Overall Component Average
End Markets
100 = Stable



OVERALL MARKET
Market Status and Outlook
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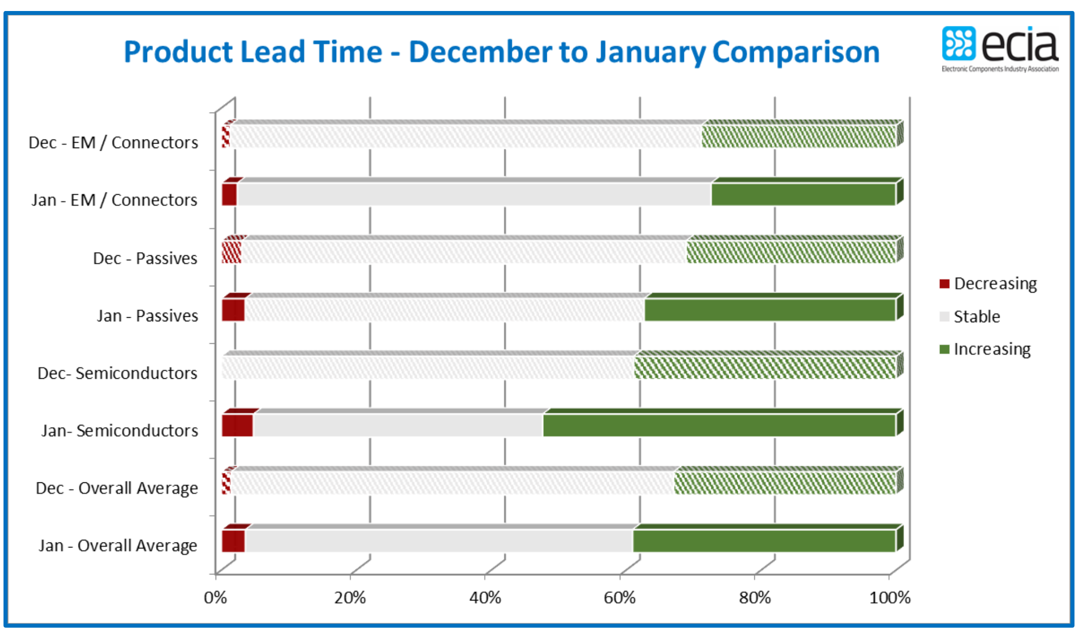
Electronic Components Industry Association
Percentage Response
50%
45%
40%
35%
30%
25%
20%
15%
10%
5%
0%
Aug-24
Sep-24
Oct-24
Nov-24
Dec-24
Jan-25
Feb-25
Mar-25
Apr-25
May-25
Jun-25
Jul-25
Aug-25
Sep-25
Oct-25
Nov-25
Dec-25
Jan-26
Worse (Current vs. Prior)
Better (Current vs. Prior)
Worse (Next vs. Current)
Better (Next vs. Current)



Product Lead Time - December to January Comparison
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Electronic Components Industry Association
Dec - EM / Connectors
Jan - EM / Connectors
Dec - Passives
Jan - Passives
Dec- Semiconductors
Jan- Semiconductors
Dec - Overall Average
Jan - Overall Average
0%
20%
40%
60%
80%
100%
Decreasing
Stable
Increasing

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.