Strong Sustained Sales Sentiment Revealed in July 2025 Industry Pulse Survey

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

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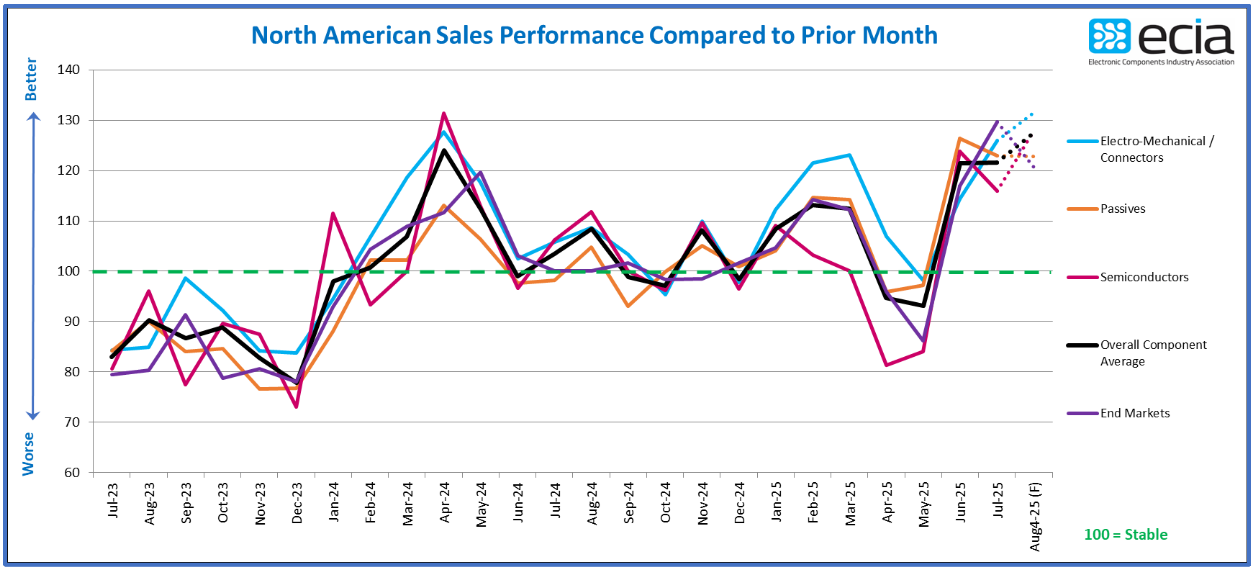
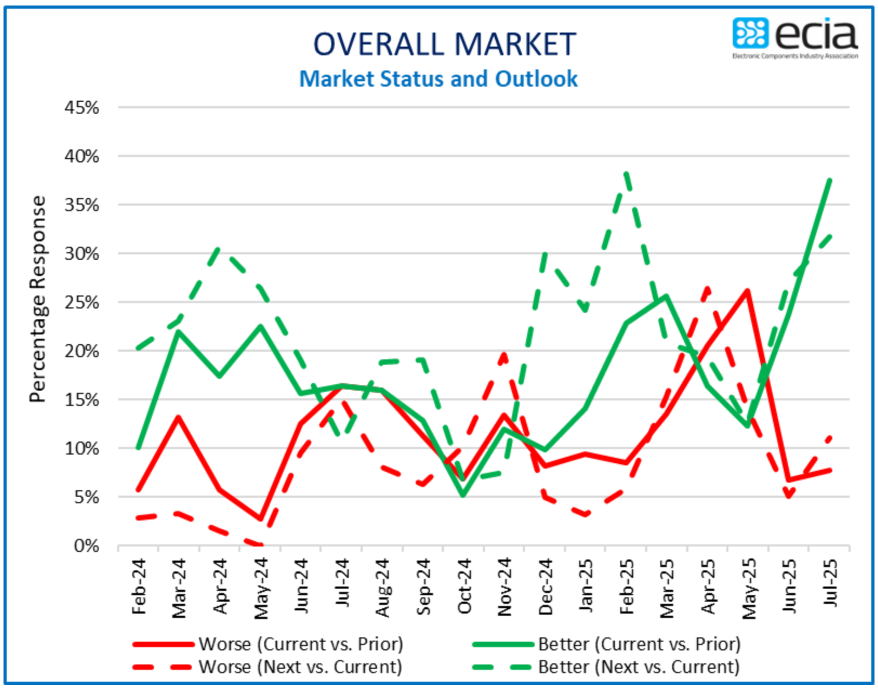
The results from the July Industry Pulse Survey by ECIA present a continuing bright picture of sales sentiment across all product segments and end-markets. The overall average product index score held steady compared to June, with a score of 121.6 in July. This follows a meteoric jump in the overall index between May and June. Amazingly, the outlook for August improves over July with an increase in the index score to 127.5. If this projection is realized, it would be the strongest index score since February 2022, three and 1/2 years ago. In recent surveys, ECIA began measuring sales sentiment compared to the same month in the prior year. The results of this measurement are even stronger than the month-to-month perspective. The year-over-year average product index score for July reaches 151. In this measurement, the lowest product score is 129. The overall end-market score compared to last year also delivers strong results with an index score of 145. Clearly, the sales environment for electronic components has experienced a strong recovery since the summer of 2024.

Electro-Mechanical/Connector Components continued to lead all categories with its strong index score of 125.9, an increase of 11.5 from June. This category continues with its robust optimism into August with a projected score of 131.5. The scores for Semiconductors and Passive Components dipped slightly from their June levels. However, both categories handily beat their projections for July from the June survey. The survey results call for Semiconductor optimism to see strong growth in August with a projected score of 128. The positive July Industry Pulse results align with the most recent U.S. economic results, as the government delivered very favorable statistics for the second quarter of 2025. Hopefully, this favorable economic climate will continue and enable further improvements in sales of electronic components.

Once again, Manufacturer Representatives delivered the most robust scores for sales sentiment in July in every component category. The overall index score reported by this group tops 148 in July. While relatively more conservative in their assessment, Manufacturers and Distributors still deliver overall average July scores of 109 and 104, respectively. The overall end-market index score topped the product category scores as it sailed to 129.7 in July. Every individual end-market came in above the 100-point threshold in July, led by the Industrial and Avionics/Military/Space segments at 139.3 and 136.5, respectively. The outlook for August calls for every market except for Mobile Phones to sustain scores above 100. The continued broad-based positive results for June through the August outlook reinforce the very optimistic picture these results portray. Hopefully, this renewed sales momentum can be sustained through the end of 2025.

Reports for lead time scores continue to portray a highly stable environment in spite of a notable increase in reports of increasing lead times. Participants reporting increasing lead times grew from 9% on average in June to 23% in July. With only 2% reporting decreasing lead times, stability dominates the picture with 75% seeing a stable environment. As a growing number of tariff agreements are finalized between the U.S. and other major countries/economies, it is hoped that this will lead to a healthy geopolitical environment which will help sustain a healthy supply chain.





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.