

Double-digit Bookings and Billings in June 2Q25 Sales Up +13.8%

Regional Performance:

YOY, all regions except the ROW region exhibited growth in June, with the greatest growth, like in previous months, in the Asia Pacific region, where billings increased a strong +42.9%, followed by China, where billings increased +19.2%. YTD, sales are positive in five of the six regions, with the ROW region not exhibiting growth, with sales declining -4.3%. The greatest YTD growth was seen in the Asia Pacific region at +29.3%, followed by China with YTD growth of +21.2%. See page 5.

Industry Forecast:

With YTD growth of +9.9% through June, forecasted growth of +7.9% is achievable.

2025 Currency Impact:

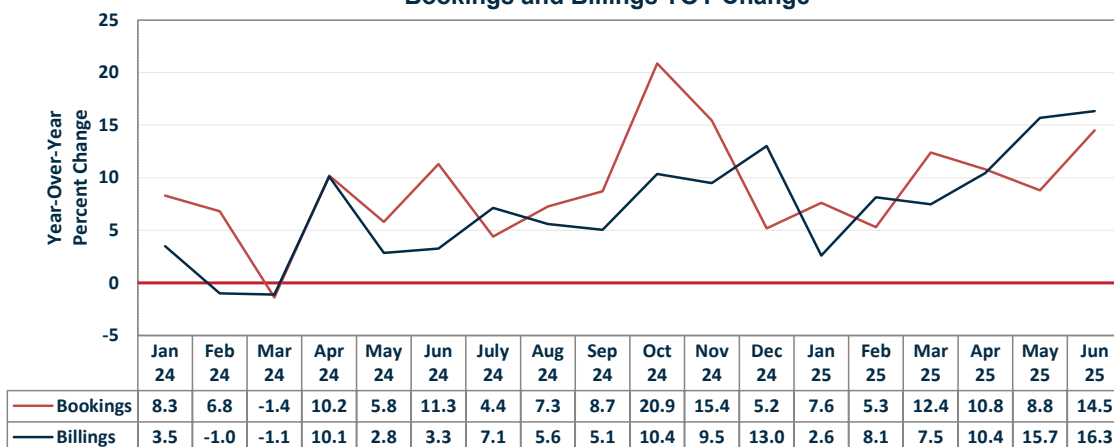
The industry registered a YOY increase in sales in June 2025, of +16.3% in USD and +2.7% in local currency.

NEW BISHOP
RESEARCH REPORT

Top 100
Connector
Manufacturers

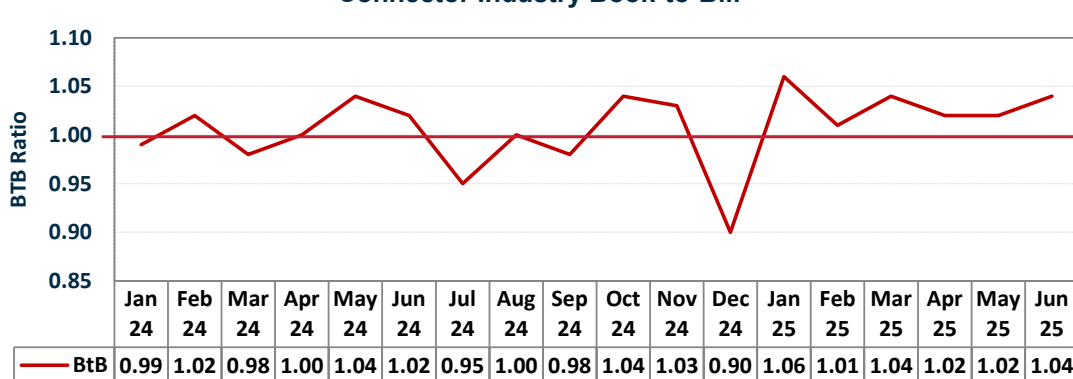
June bookings increased by +14.5% while billings increased by +16.3%.

Bookings and Billings YOY Change



The book-to-bill ratio in June was 1.04, up from 1.02 in May and April. This is the 13th month in the last 18 months where the book-to-bill has been 1.0 or better.

Connector Industry Book-to-Bill

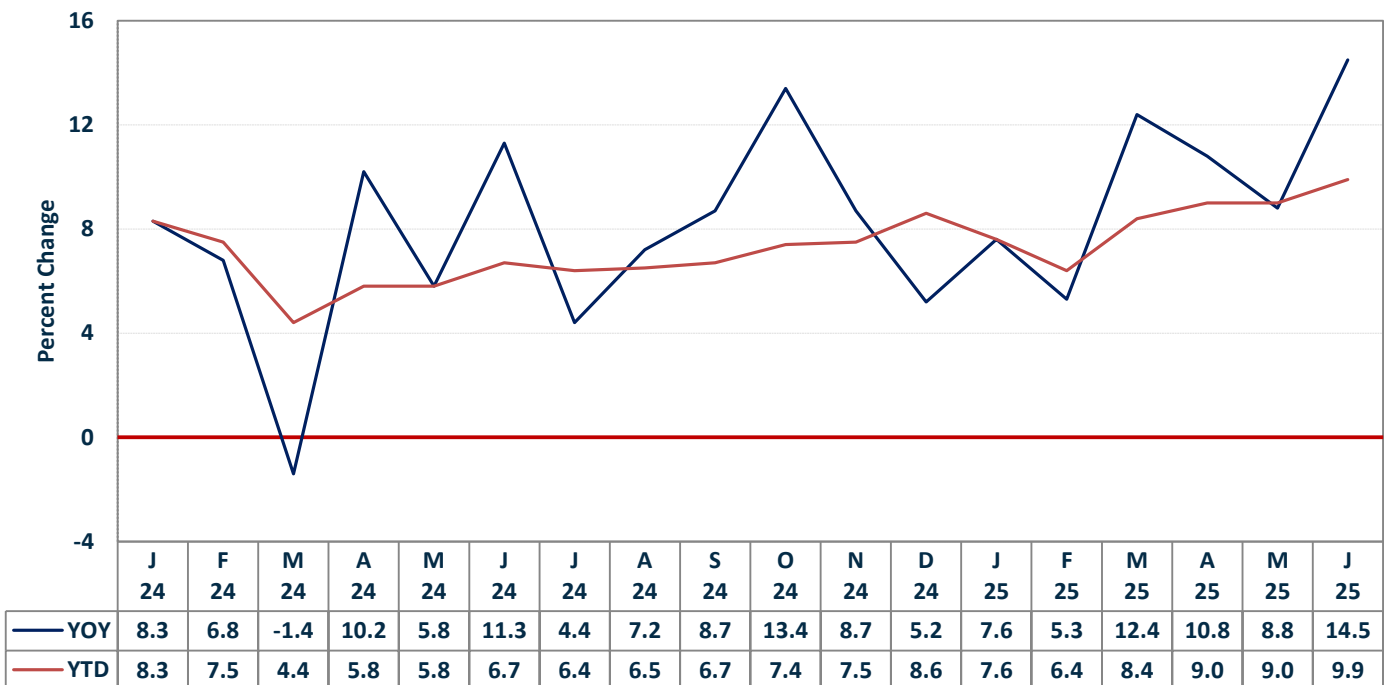


Booking Highlights and Conclusions

Sequential, Year-Over-Year, and Year-To-Date Bookings Percentage Change – 2023/2024/2025

Month	Sequential			Year-Over-Year			Year-To-Date		
	2023	2024	2025	2023	2024	2025	2023	2024	2025
Jan	-1.3%	9.1%	2.3%	-18.4%	8.3%	7.7%	-18.4%	8.3%	7.7%
Feb	10.1%	5.2%	5.5%	-13.8%	6.8%	5.3%	-18.4%	7.5%	6.5%
Mar	1.2%	-2.9%	2.1%	-12.9%	-1.4%	12.4%	-16.6%	4.4%	8.4%
Apr	-5.1%	3.2%	-1.3%	-9.7%	10.2%	10.8%	-15.0%	5.8%	9.0%
May	13.5%	9.1%	12.0%	-3.9%	5.8%	8.8%	-12.8%	5.8%	9.0%
Jun	-12.7%	-6.8%	-5.3%	-10.3%	11.3%	14.5%	-12.4%	6.7%	9.9%
Jul	0.3%	-5.8%		-0.3%	4.4%		-10.9%	6.4%	
Aug	9.2%	11.6%		0.7%	7.3%		-9.5%	6.5%	
Sep	-5.4%	-5.0%		-3.7%	8.7%		-8.9%	6.8%	
Oct	-3.2%	9.6%		5.9%	20.9%		-7.6%	8.1%	
Nov	11.8%	4.9%		7.7%	15.4%		-6.3%	8.8%	
Dec	-13.7%	-21.6%		0.2%	5.2%		-5.9%	8.6%	

Bookings - YOY and YTD



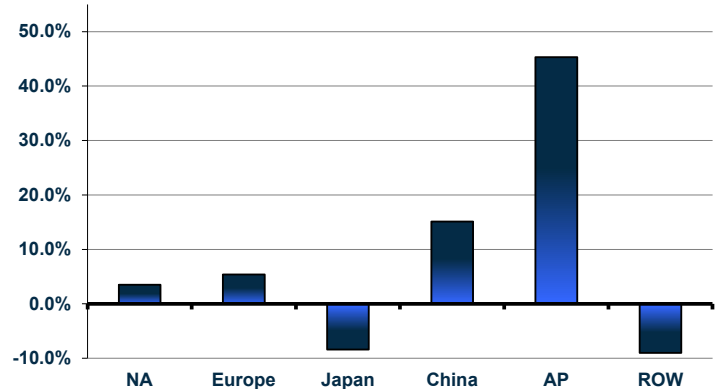
- June bookings increased +14.5% year-over-year.
- Orders decreased -5.3% on a sequential basis in June.
- The book-to-bill ratio for June was 1.04, up from 1.02 in May.

Regional Performance: BOOKINGS

June 2025 Bookings

Year-To-Date Bookings by Region

Region	Sequential	YOY	YTD
NA	6.4%	14.9%	3.5%
Europe	-6.1%	21.3%	5.4%
Japan	-1.4%	-4.3%	-8.4%
China	-10.9%	0.1%	15.1%
AP	-14.7%	44.3%	45.3%
ROW	-24.9%	-9.9%	-9.0%
Total	-5.3%	14.5%	9.9%



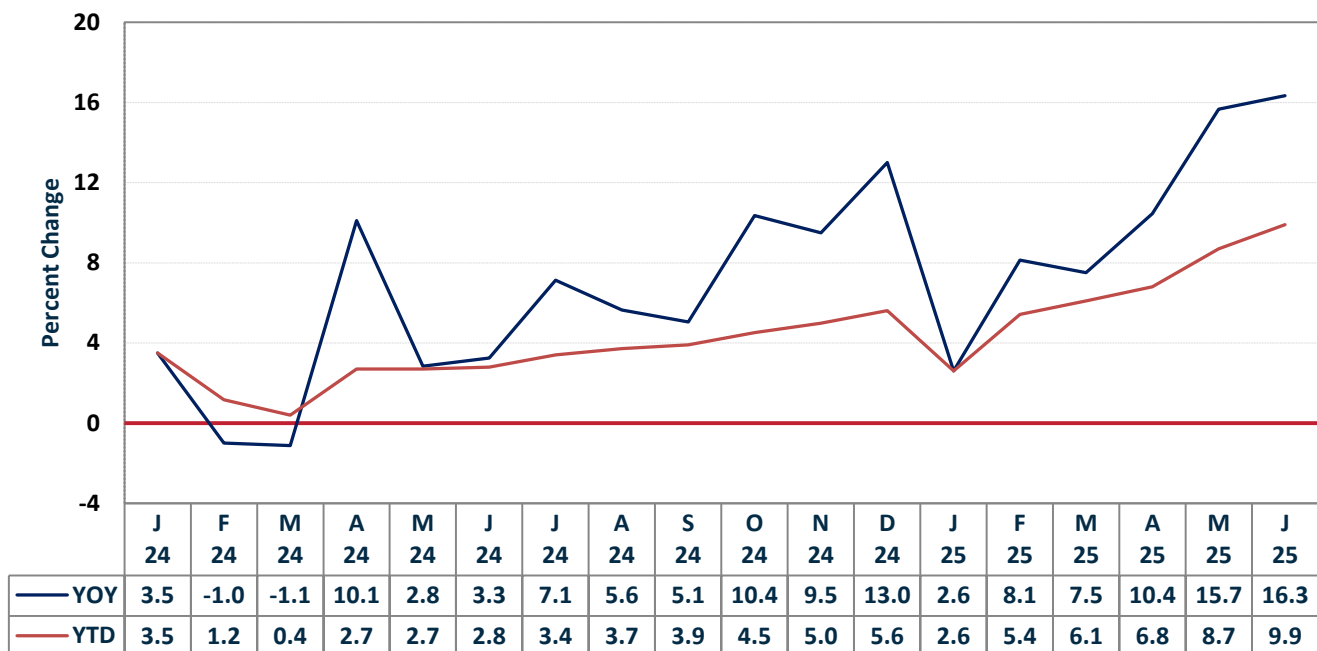
- Year-to-date, June bookings increased +9.9%. Sequentially all regions except North America saw a decrease, with the ROW region decreasing the most at -24.9, followed by Asia Pacific where sales decreased -14.7%. North America, the only region increasing sequentially in June, showed growth of +6.4%.
- In June, year-over-year orders rose in all but two regions, Japan and the ROW region, where bookings declined -4.3% and -9.9% respectively. All other regions saw growth, with Asia Pacific growing the most, up +44.3%, followed by the European region, where sales increased +21.3%. From a year-to-date standpoint, sales grew in four of the six regions, with the greatest growth in the Asia Pacific region where sales increased +45.3%, followed by China, where sales increased +15.1%.
- Year-over-year order growth has now been positive for 15 consecutive months.

Billing Highlights and Conclusions

Sequential, Year-Over-Year, and Year-To-Date Billings Percentage Change – 2023/2024/2025

Month	Sequential			Year-Over-Year			Year-To-Date		
	2023	2024	2025	2023	2024	2025	2023	2024	2025
Jan	-3.1%	5.8%	5.5%	0.5%	3.5%	2.1%	0.5%	3.5%	2.1%
Feb	9.7%	2.8%	9.9%	-1.0%	-1.0%	7.6%	-0.3%	1.2%	4.9%
Mar	-0.9%	0.4%	0.0%	0.3%	-1.1%	7.0%	-0.1%	0.4%	5.6%
Apr	-7.9%	1.7%	0.4%	-1.0%	10.1%	10.4%	-0.3%	2.7%	6.8%
May	12.1%	4.3%	11.8%	-0.6%	2.8%	15.7%	-0.4%	2.7%	8.7%
Jun	-6.0%	-4.9%	-7.0%	-6.7%	3.3%	16.3%	-1.5%	2.8%	9.9%
Jul	-1.7%	1.8%		-1.2%	7.1%		-1.4%	3.4%	
Aug	7.2%	5.8%		-2.8%	5.6%		-1.6%	3.7%	
Sep	-2.7%	-3.0%		-10.0%	5.1%		-2.6%	3.9%	
Oct	-2.1%	3.2%		2.5%	10.4%		-2.1%	4.5%	
Nov	7.9%	5.1%		0.0%	9.5%		-1.9%	5.0%	
Dec	-12.4%	-9.5%		-2.8%	13.0%		-2.7%	5.6%	

Billings - YOY and YTD

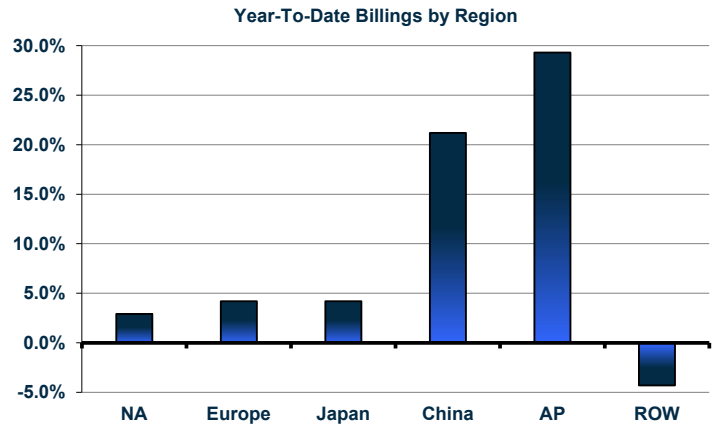


- June billings grew +9.9% year-to-date and +16.3% year-over-year.
- Sequentially, May billings decreased -7.0%.
- Year-over-year sales growth has now been positive for 15 consecutive months and year-to-date for 18 consecutive months.

Regional Performance: BILLINGS

June 2025 Billings

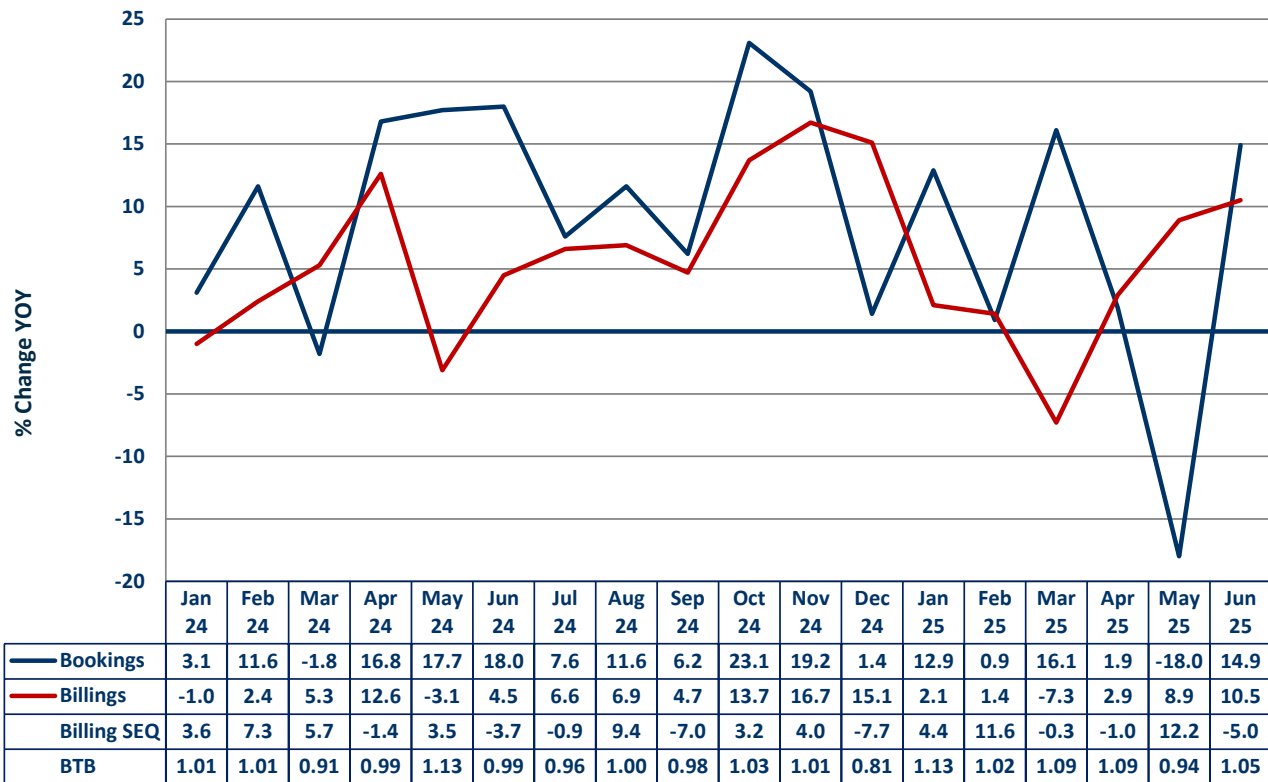
Region	Sequential	YOY	YTD
NA	-5.0%	10.5%	2.9%
Europe	-12.7%	13.7%	4.2%
Japan	2.1%	6.3%	4.2%
China	-10.4%	19.2%	21.2%
AP	6.0%	42.9%	29.3%
ROW	-15.1%	-2.7%	-4.3%
Total	-7.0%	16.3%	9.9%



- June connector sales increased by +16.3% compared to the same period last year.
- Two of the six regions saw a sequential increase in June, with the Asia Pacific region increasing the most at +6.0%, followed by Japan with growth of +2.1%. The ROW region, saw the greatest sequential decline, decreasing -15.1%.
- Year-over-year, all regions except the ROW region saw an increase, and once again, similar to last month, the greatest increase was in Asia Pacific where year-over-year sales increased +42.9%, followed by China where sales grew +19.2%. Year-to-date, also like last month, all but the ROW region saw an increase. Asia Pacific saw the greatest growth, increasing +29.3%. Asia Pacific was followed by China where year-to-date sales increased +21.2%.

North America: The following chart displays the year-over-year percentage change in bookings and billings for the last 18 months. The monthly book-to-bill (BTB) ratio is also displayed.

**North America Bookings and Billings
Year-Over-Year Percentage Change
& Book-To-Bill Ratio**

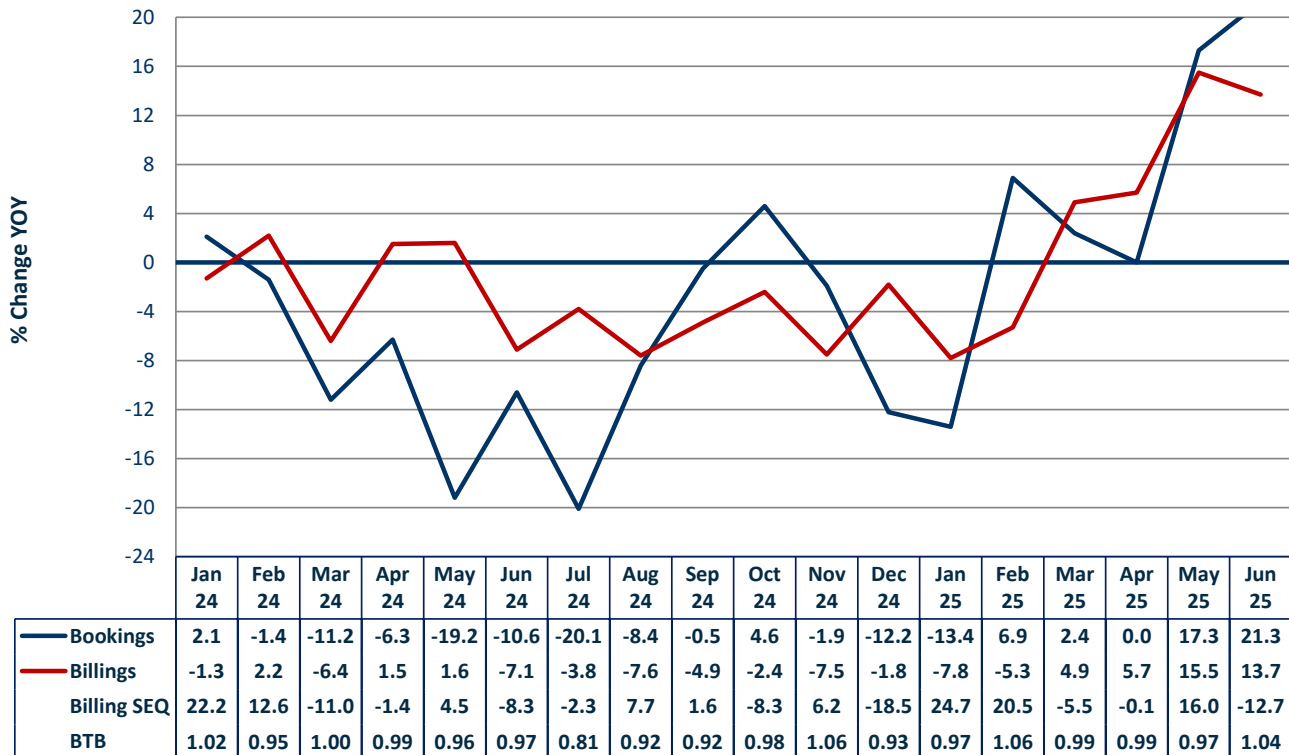


North America Performance

- Sales increased +10.5% year-over-year in North America in June, while orders increased +14.9%, after falling -18.0% in May. Sequentially, North American billings decreased -5.0% after returning to positive territory in May. The book-to-bill ratio was 1.05.
- “In June, the Consumer Price Index for All Urban Consumers rose 0.1 percent, seasonally adjusted, and rose 2.7 percent over the last 12 months, not seasonally adjusted. The index for all items less food and energy increased 0.2 percent in June (SA); up 2.9 percent over the year (NSA)”, according to the US Bureau of Labor Statistics.
- “Retail trade sales were up 0.6 percent (±0.5 percent) from May 2025, and up 3.5 percent (±0.5 percent) from last year. Nonstore retailers were up 4.5 percent (±1.4 percent) from last year, while food service and drinking places were up 6.6 percent (±1.8 percent) from June 2024”, according to U.S. Census Bureau.
- “The unemployment rate was 4.1% in June, slightly down from 4.2% in May and continues to remain in a narrow range of 4.0 % to 4.2% since May 2024” according to the U.S. Census Bureau.
- “The number of new vehicles sold in the U.S. in June 2025, aggregated by MarkLines as of July 2, was 1,259,037 units, down 5.6% from the same month last year”. It was indicated this was likely due to an end to rush buying in anticipation of price hikes associated with the tariffs.

Europe: The following chart displays the year-over-year percentage change in bookings and billings for the last 18 months. The monthly book-to-bill ratio is also displayed.

Europe Bookings and Billings
Year-Over-Year Percentage Change
& Book-To-Bill Ratio

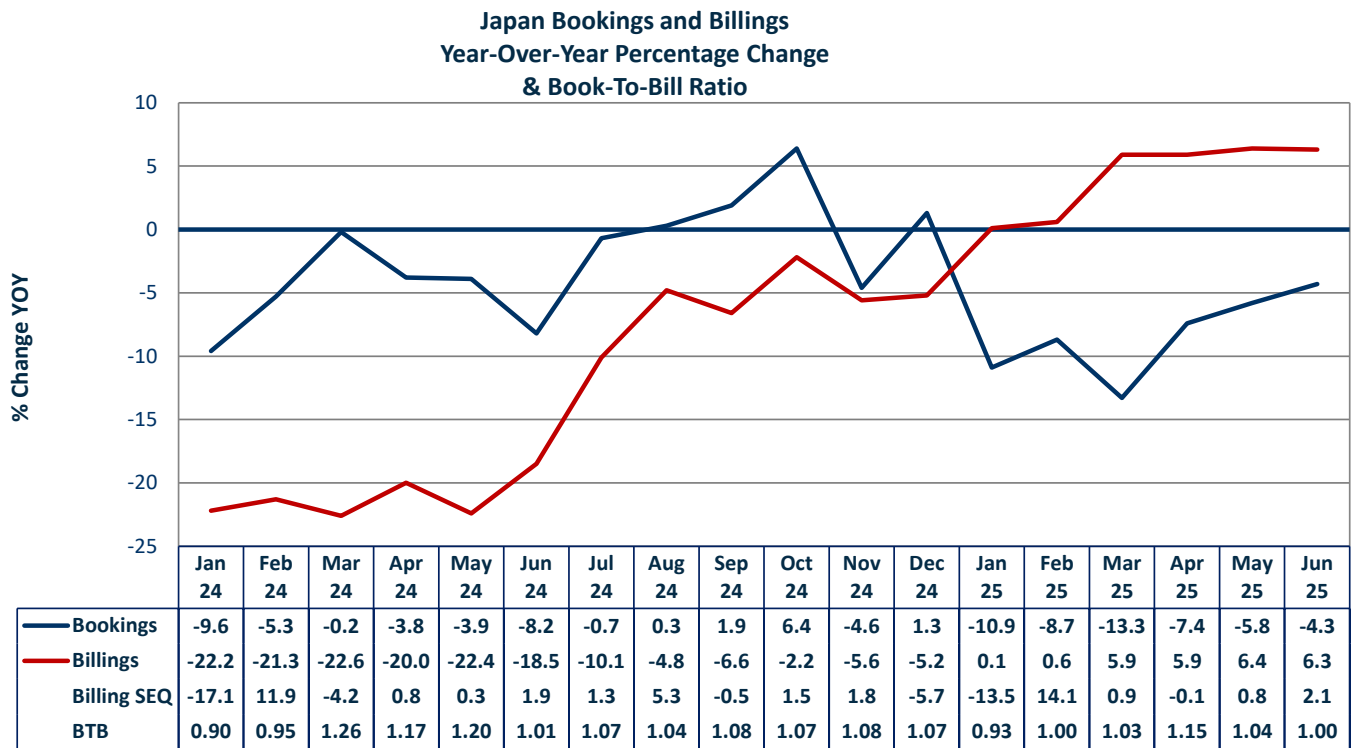


Europe Performance

- Bookings increased +21.3% in June, the largest increase in bookings since December 2021. Billings increased +13.7%, after rising to +15.5% in May. Sequentially, sales declined by -12.7%. The book-to-bill ratio was 1.04, up from 0.97 in May.
- "In May* 2025, compared with May 2024, industrial production increased by 3.7% in the euro area and by 3.4% in the EU." Compared with April 2025, "production increased by 1.7% in the euro area and by 1.5% in the EU," according to Eurostat. New car sales In June 2025 fell more than 5% according to the European Automobile Manufacturers Association (ACEA).
- "In May* 2025, the euro area seasonally adjusted unemployment rate was 6.3%, up from 6.2% in April 2025 and down from 6.4% in May 2024. The EU unemployment rate was 5.9% in May 2025, stable compared with April 2025 and down from 6.0% in May 2024", according to Eurostat.
- "In June 2025, the Economic Sentiment Indicator (ESI) decreased in both the EU (-1.0 points to 94.0) and the euro area (-0.8 points to 94.0). The Employment Expectations Indicator (EEI) stayed broadly unchanged compared to May (EU: ±0.0 at 97.5, euro area: +0.1 points to 97.1). Both indicators score below their long-term average of 100", according to the European Commission.

**June readings not published at the time of this reporting.*

Japan: The following chart displays the year-over-year percentage change in bookings and billings for the last 18 months. The monthly book-to-bill ratio is also displayed.



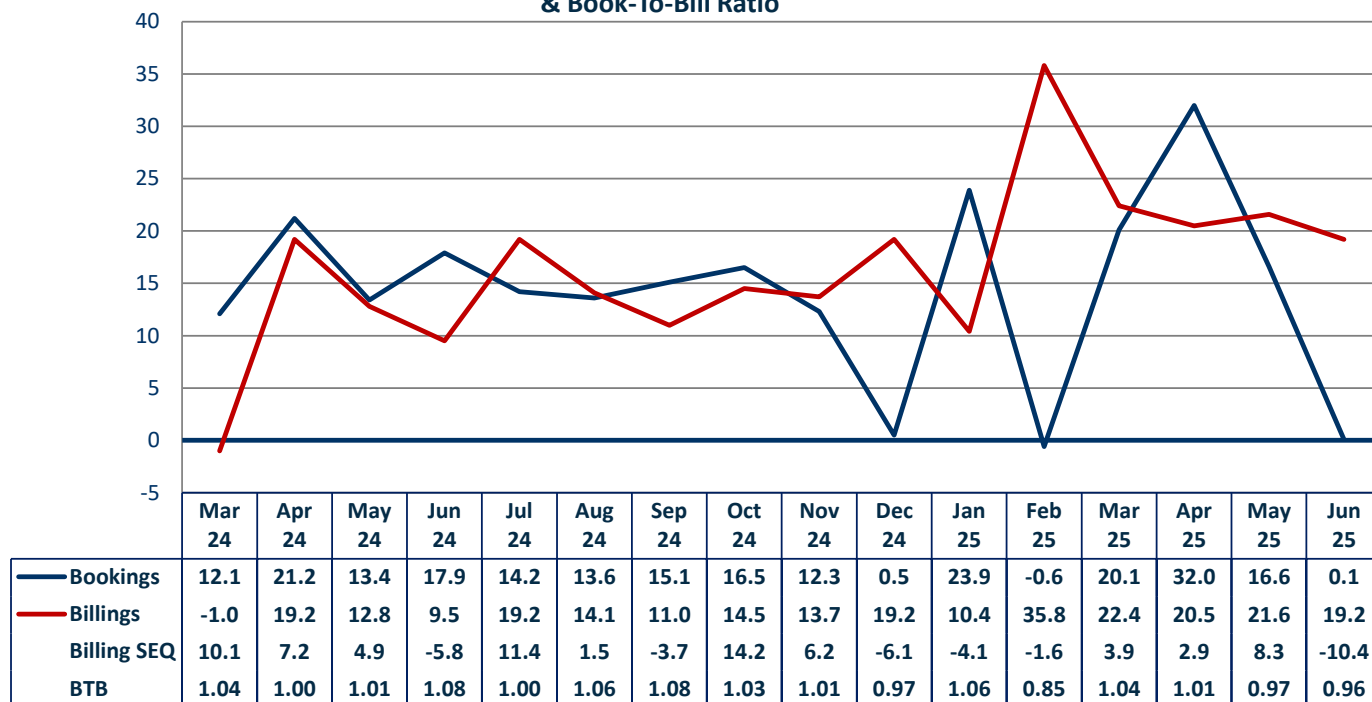
Japan Performance

- Japan's June year-over-year bookings decreased -4.3%, while sales increased +6.3%. Billings have now been positive for the first half of 2025. Sequentially, sales increased +2.1%. Japan's book-to-bill ratio was 1.00, down from 1.04 in May.
- The Tokyo consumer price index, which excludes volatile fresh food costs, rose 2.9% in July from a year earlier, government data showed. This was slightly below the median market forecast for a 3.0% increase. It followed a 3.1% rise in June, and according to Reuters it was due largely to the base effect of last year's rise in energy prices, which came from the termination of government subsidies to curb fuel bills.
- "The S&P Global Japan Composite PMI held steady at 51.5 in July 2025, unchanged from June's final reading, flash data showed. This was the fourth straight month of private sector growth, maintaining the strongest pace of increase since February", according to Trading Economics.
- Japan's unemployment rate remained unchanged at 2.5% in May*. This is compared to 2.60% last year, and lower than the long-term average of 3.43% according to YCharts. New vehicle sales in June increased 5.2% YOY to 393.2K units, according to MarkLine.
- "Japan's exports in June contracted 0.5% year over year, extending the 1.7% drop seen in May as deliveries continued to decline for the second straight month", according to CNBC.

**June readings not published at the time of this reporting.*

China: The following chart displays the year-over-year percentage change in bookings and billings for the last 18 months. The monthly book-to-bill ratio is also displayed.

**China Bookings and Billings
Year-Over-Year Percentage Change
& Book-To-Bill Ratio**

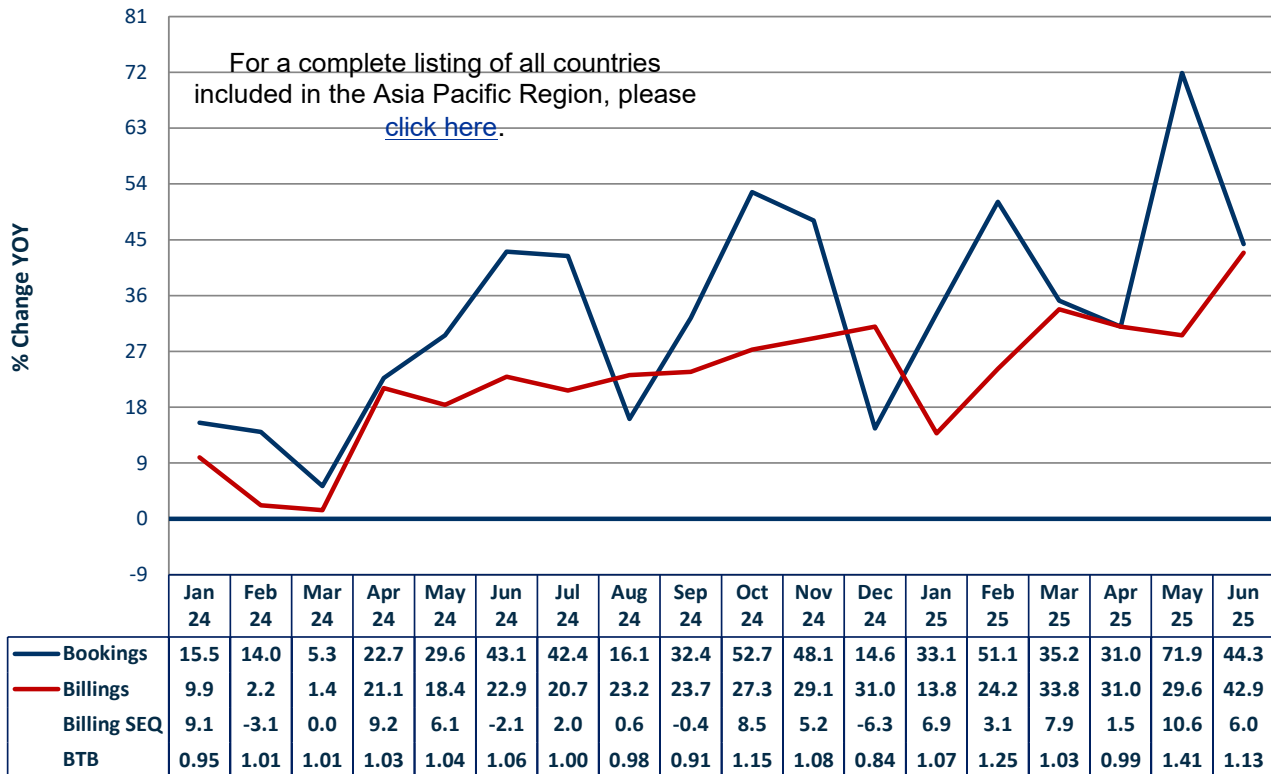


China Performance

- China's June sales grew +19.2% on a year-over-year basis. Bookings increased by +0.1%. Sequentially, sales decreased by -10.4%. The BTB decreased to 0.96 after declining to 0.97 in May.
- "China PMI is at a current level of 49.70, up from 49.50 last month and up from 49.50 one year ago. This is a change of 0.40% from last month and 0.40% from one year ago, according to YCharts.
- "Consumer Price Index CPI in China decreased to 102.90 points in June from 103.00 points in May of 2025", according to Trading Economics.
- In June, "vehicle production and sales volumes totaled 2.794 million and 2.904 million units, up 11.4% and 13.8% year-over-year, respectively. Year-to-date production and sales volumes were 15.621 million and 15.653 million units, up 12.5% and 11.4% respectively year-over-year", according to MarkLines.
- "China's surveyed unemployment rate stood at 5.0% in June 2025, unchanged from the previous month and in line with market expectations. The reading remained at its lowest level since November last year", according to Trading Economics.
- "Exports from China increased by 5.8% year-on-year to USD 325.2 billion in June 2025, slightly above expectations of a 5.0% rise and accelerating from 4.8% growth in May. The uptick in export growth came amid a temporary easing of tariff pressures ahead of the August deadline. Notably, rare-earth exports surged 32% mom, potentially reflecting progress from agreements reached in June to ease restrictions and restore global supply", according to Trading Economics.

Asia Pacific: The following chart displays the year-over-year percentage change in bookings and billings for the last 18 months. The monthly book-to-bill ratio is also displayed.

**Asia Pacific Bookings and Billings
Year-Over-Year Percentage Change
& Book-To-Bill Ratio**

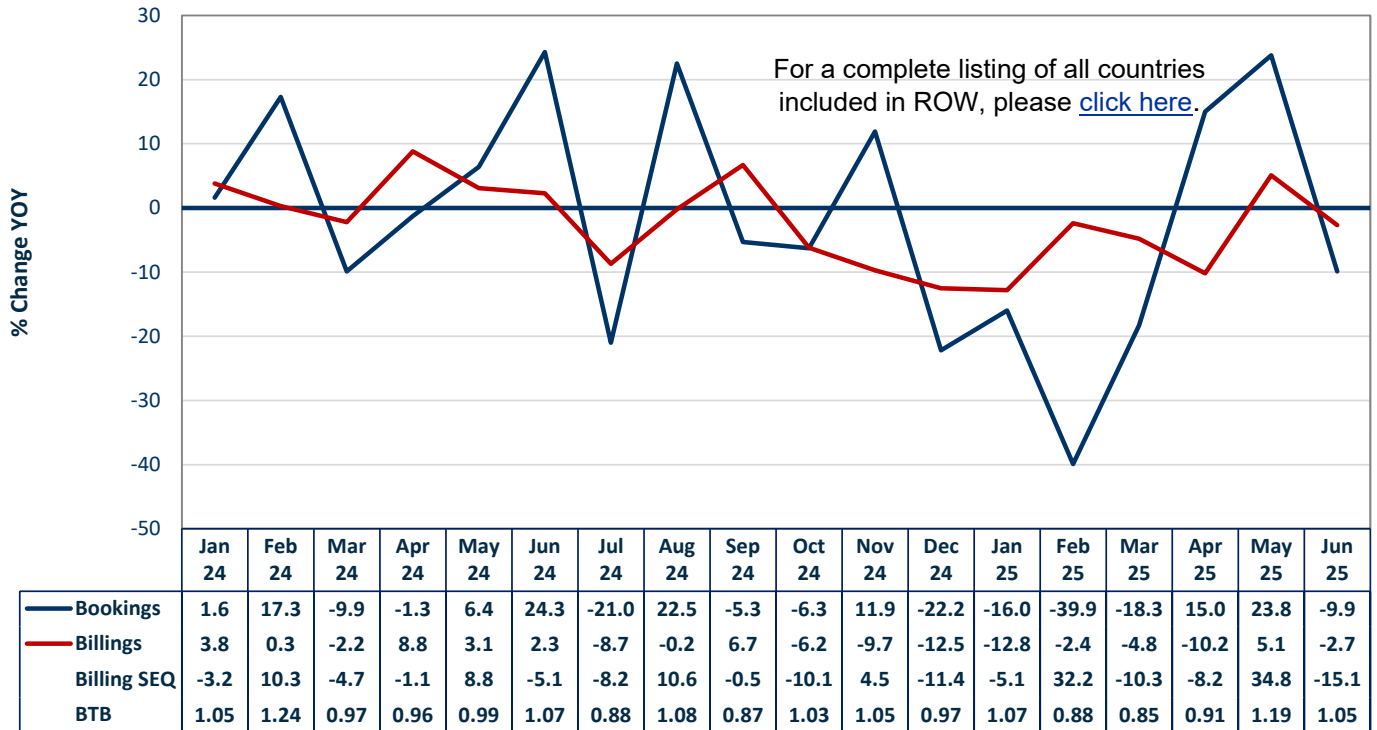


Asia Pacific Performance

- Year-over-year, June orders were up +44.3%, after reaching +71.9% in May. Billings increased by a strong +42.9%, the highest billings in over five years. Sequentially, sales increased by +6.0%. The book-to-bill ratio was 1.13, down from 1.41 in May.
- "India's Consumer Price Index (CPI) inflation for June 2025 was 2.10%, a more than six-year low. This is a significant drop from 2.82% in May 2025. The decline is partly due to positive base effects and easing prices in key food categories. Specifically, food inflation contracted by 1.06% in June", according to The Hindu.
- "The seasonally adjusted HSBC India Manufacturing Purchasing Managers' Index for June 2025 rose to 58.4, a 14-month high, up from 57.6 in May", according to S&P Global. "This indicates a strong expansion in the Indian manufacturing sector, with production growth reaching its fastest pace since April 2024".
- "The Ministry of Trade, Industry and Energy (MOTIE) announced today that Korea's exports and imports for the month of June 2025 advanced 4.3 percent and 3.3 percent year-on-year to USD 59.8 billion and \$50.7 billion, respectively", according to Korea.net.
- "South Korea's seasonally adjusted unemployment rate edged lower to 2.6% in June 2025, down from 2.7% in the previous month", according to Trading Economics.

Rest of World: The following chart displays the year-over-year percentage change in bookings and billings for the last 18 months. The monthly book-to-bill ratio is also displayed.

ROW Bookings and Billings
Year-Over-Year Percentage Change
& Book-To-Bill Ratio



Rest of World Performance

- Orders decreased -9.9%, while billings decreased -2.7% year-over-year. Sequentially, sales decreased by -15.1%. The book-to-bill ratio was 1.05 down from May's book-to-bill of 1.91.
- "The Consumer Price Index in Brazil increased to 7312.97 points in June from 7295.46 points in May of 2025. Brazil's annual inflation rate edged up to 5.35% in June 2025 from 5.32% in the prior month", according to Trading Economics.
- "Falling from 49.4 in May to 48.3 in June, the S&P Global Brazil Manufacturing PMI® – a single-figure indicator of manufacturing performance – indicated the fastest deterioration performance in operating conditions since July 2023, according to S&P Global."
- "South Africa's seasonally adjusted Absa Purchasing Managers' Index (PMI) rose to 48.5 in June 2025 from 43.1 in May", marking its second-highest reading of the year. Although the index remained below the 50-point threshold for the eighth consecutive month—signaling ongoing contraction—it pointed to improving momentum in the manufacturing sector.
- "The seasonally adjusted Purchasing Managers' Index (PMI) sponsored by South African bank Absa declined to 43.1 points from 44.7 in April", according to Reuters.

Regional Summary Snapshot

The following table shows a snapshot of the performance of each region. The table displays the latest metric available, and the trend of the metric compared to prior months/quarters.

	North America	Europe	Japan	China	Asia Pacific	ROW
GDP Growth YOY	1.6% Steady	0.6% Steady	0.6% Up	5.3% Up	N/A	N/A
Industrial Production Growth	0.3% Up	1.7% Up	0.3% Up	6.8% Up	N/A	N/A
Manufacturing PMI*	49.0 Down	49.8 Up	50.1 Up	49.7 Up	N/A	N/A
Inflation Rate	2.7% Up	2.0% Up	3.3% Down	+0.1% Up	N/A	N/A
Unemployment Rate	4.1% Down	6.3% Up	2.5% Unchanged	5.0% Unchanged	N/A	N/A
Retail Sales Growth YOY	0.6% Up	0.9% Up	3.7% Up	4.8% Down	N/A	N/A
June Connector Sales	10.5%	13.7%	6.3%	19.2%	42.9%	-2.7%
YTD Connector Sales	2.9%	4.2%	4.2%	21.2%	29.3%	-4.3%
June Connector Orders	14.9%	21.3%	-4.3%	0.1%	44.3%	-9.9%
YTD Connector Orders	3.5%	5.4%	-8.4%	15.1%	45.3%	-9.0%

* Purchasing Manager Index - Below 50 is contracting factory activity

Key Take Aways:

- Inflation appears once again to be rising with Japan the only region showing a decrease. Even China, who has remained stable saw a small increase in June.
- Unemployment remained high in Europe at 6.3% and low in Japan, while remaining stable to slightly down in all other regions.
- June connector sales were up double-digits in all regions except Japan and the ROW region with the greatest growth in the Asia Pacific region, where year-over-year connector sales were up +42.9%. The ROW region, the only region showing negative growth was down -2.7%.

The Industry Backlog Is 12.1 Weeks

The industry shipped \$1,845 million per week through June. Orders are up +9.9% year-to-date and the book to bill ratio is 1.04.

The following table shows the world connector backlog of orders.

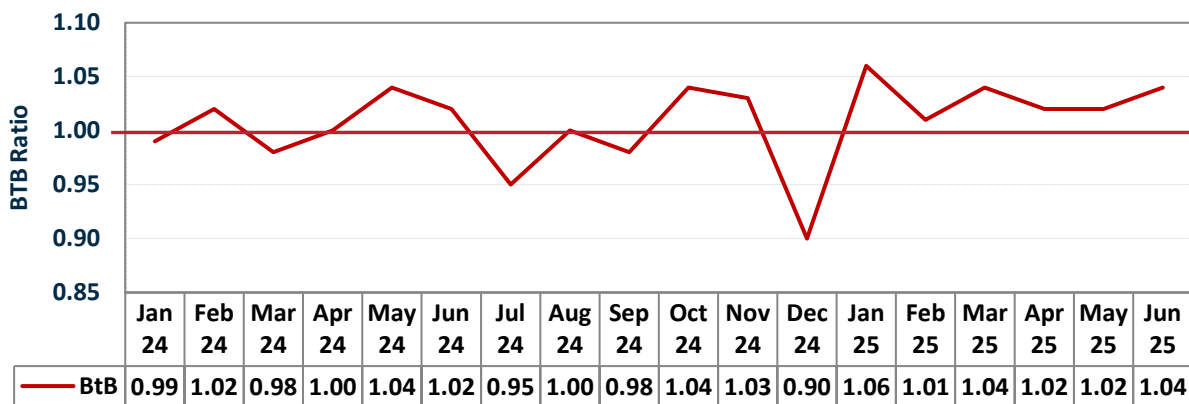
Industry Backlog

	Full Year 2024	June 2025
BtB Ratio	1.00	1.04
Beginning Backlog	\$21,017	\$21,287
YTD Bookings	\$86,592	\$47,597
YTD Billings	\$86,322	\$46,537
Ending Backlog	\$21,287	\$22,347
Backlog in Weeks	12.6	12.1

\$ Millions

The book-to-bill (BtB) ratio was 1.04 in June. The following displays the trend of Book-to-Bill ratios since January of 2024.

Connector Industry Book-to-Bill



The backlog has increased by a \$1,060 million during the first six months of 2025. See the table below.

Change in Backlog

2024 Ending Backlog	\$21,287
2025 June Ending Backlog	\$22,347
Backlog Growth	\$1,060

\$ Millions

Currency Fluctuations Reduce Performance between USD and Local Currency

The dollar has been fluctuating against the euro, the yen, and the yuan. The following table measures the impact for June 2024 versus June 2025 and shows results for these three currencies.

Local Currency to One USD 2024 YTD versus 2025 YTD

Currency	2024	2025	% Change
Euro	0.9289	0.8682	7.0%
Yuan	7.2534	7.1826	1.0%
Yen	157.9846	144.5751	9.3%

Europe, China, and Japan account for approximately 60% of world connector sales. Currency fluctuation against the US dollar can have a significant impact on our reporting of sales performance in US dollars.

The following table shows June YOY performance by region in US dollars and local currencies.

Industry Sales Performance June 2025 USD-vs-Local Currencies

Region	U.S.\$	Local Currency
North America	10.5%	10.5%
Europe	13.7%	7.0%
Japan	6.3%	9.3%
China	19.2%	1.0%
Asia Pacific	42.9%	42.9%
ROW	-2.7%	-2.7%
World	16.3%	2.7%

Connector sales in June of 2025 increased +2.7% when measured in local currencies, versus an increase of +16.3% in US dollars.

2025 Outlook for Connectors

Connector demand is very strong as verified by double-digit growth in the past three months. In fact, both orders and sales have achieved year-over-year growth in every month in 2025.

The following table displays connector industries orders and sales growth by month.

World Connector Results Percentage Change

Month	Bookings	Billings
January	7.7%	2.1%
February	5.3%	7.6%
March	12.4%	7.0%
April	10.8%	10.4%
May	8.8%	15.7%
June	14.5%	16.3%
Year-to-Date	9.0%	10.0%

Note: The numbers may vary slightly from those previously published in 2025 Bishop Reports because of adjustments from participating companies.

These results are very encouraging, especially because demand appears to be strengthening.

Quarterly Analysis

The connector industry achieved sales in 2Q25 of \$23,950, up +13.8% in US dollars compared to 2Q24. We anticipate the third quarter to be up 6.9% and the fourth quarter to be up 4.8%, leading to year-over-year growth of 7.9%.

The following table shows industry sales by quarter for 2023, 2024, and 2025.

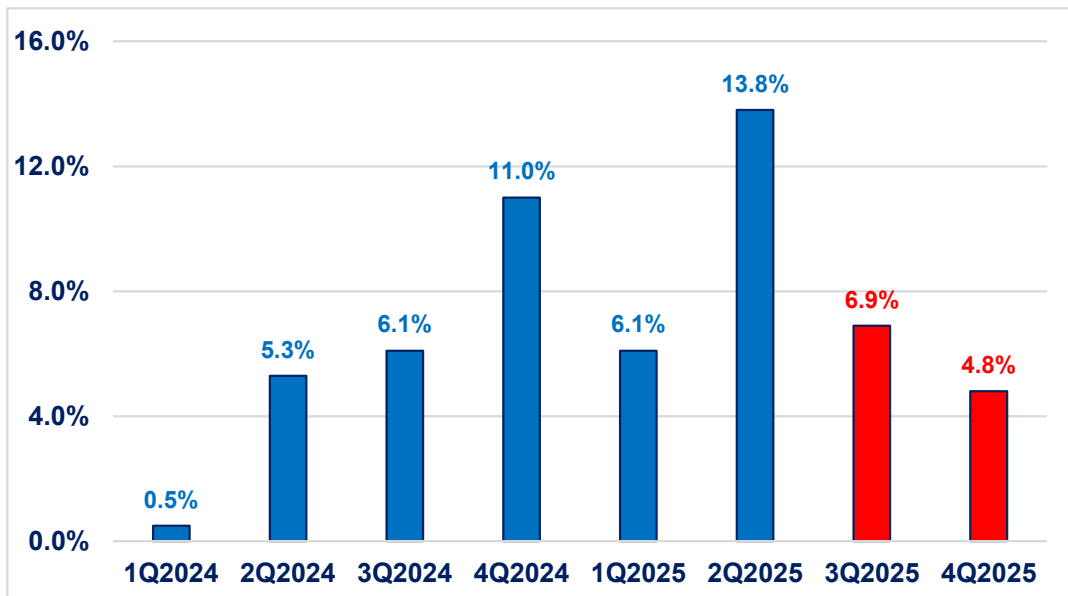
**Connector Industry Quarterly Sales Results/Forecast
2023, 2025, and 2025**

	2023	2024	YOY	2025	YOY
Quarter	Actual	Actual	Change	Actual	Change
1Q	\$21,179	\$21,281	0.5%	\$22,587	6.1%
2Q	\$19,981	\$21,042	5.3%	\$23,950	13.8%
3Q	\$21,060	\$22,353	6.1%	\$23,900	6.9%
4Q	\$19,634	\$21,802	11.0%	\$22,838	4.8%
Total	\$81,854	\$86,478	5.6%	\$93,275	7.9%

\$ Millions, Red=Forecast

©2025 Bishop & Associates, Inc.

**Quarterly Sales by Percent Change
2024 through 2025**



2025 Outlook: Historical Analysis

Over the past 15 years (2010-2024), sales through June averaged 48.5% of full-year sales. We have shipped \$46,537 million through June. If history repeats, 2025 sales will be \$95,953 million, up +11.0% over 2024 sales of \$86,478 million.

Using this methodology, we can calculate a range of possible outcomes in 2025. Over the same 15-year period the lowest June percentage of sales was 45.6%, the highest was 51.2%. As previously noted, the average was 48.5%.

Range	YTD 15-Year Percent of Total	2025 Sales	2024 Actual	Percent Growth
Low	45.6%	\$102,055	\$86,478	18.0%
Average	48.5%	\$95,953	\$86,478	11.0%
Bishop	49.9%	\$93,275	\$86,478	7.9%
High	51.2%	\$90,893	\$86,478	5.1%

\$ Millions

This analysis projects a possible sales growth range of +18.0% to a low of +5.1%. Year-to-date, sales are up +9.9%.

The following table breaks out the Bishop forecast by region.

2023, 2024, and 2025F Connector Sales By Region with Percent Change

Region	2023	2024	Percent Change	2025F	Percent Change
North America	\$18,840.8	\$20,124.7	6.8%	\$21,713.9	7.9%
Europe	\$17,992.7	\$17,417.3	-3.2%	\$17,934.5	3.0%
Japan	\$4,683.7	\$4,035.8	-13.8%	\$4,124.9	2.2%
China	\$24,977.1	\$28,003.5	12.1%	\$31,020.8	10.8%
Asia Pacific	\$11,310.0	\$13,483.5	19.2%	\$14,978.6	11.1%
ROW	\$4,049.8	\$3,412.9	-15.7%	\$3,502.6	2.6%
Total World	\$81,854.1	\$86,477.7	5.6%	\$93,275.3	7.9%

\$ in Millions

Bishop & Associates ©2025

Significant Events

July 2025 News

Hon Hai Reported Record June Sales

Hon Hai Precision Industry Co announced that its sales for last month rose 10 percent year-on-year, driven by strong growth in cloud and networking products amid the ongoing artificial intelligence (AI) boom.

The company, also known internationally as Foxconn Technology Group, reported consolidated sales of NT\$540.24 billion (US\$18.67 billion) for the month, the highest ever for the period, and a 10.09 percent increase from a year earlier, although it was down 12.26 percent from the previous month.

Hon Hai, which is Apple Inc's primary iPhone assembler and makes servers powered by Nvidia Corp's AI accelerators, said its cloud and networking division benefited from solid global demand for AI applications and cloud services to generate higher sales last month.

In addition, its smart consumer electronics division saw significant sales growth, boosted by international brands launching new entertainment devices.

Sales of the company's electronic component operations last month were little changed from a year earlier, while the computing division suffered a sales decline in the month, Hon Hai said.

Compared with May, the company's major divisions saw declines in sales last month, attributed to the stronger New Taiwan dollar against the US dollar and reduced momentum from clients in building up inventories, it said.

For the second quarter, Hon Hai reported consolidated sales of NT\$1.8 trillion, a 15.82 percent year-on-year increase and a 9.45 percent rise from the first quarter, the company said.

In the first half of this year, consolidated sales reached NT\$3.44 trillion, a 19.68 percent increase compared with the same period last year, it said.

This quarter, sales growth momentum is expected to accelerate quarterly and annually, as the information and communication technology industry enters the traditional peak season, Hon Hai said.

Foxconn to Assemble 25% to 30% of iPhones in India by End of 2025

A new iPhone factory in an out-of-the-way corner of India looks like a spaceship from another planet. Foxconn, the Taiwanese company that assembles most of the world's iPhones for Apple, has landed amid the boulders and millet fields of Devanahalli.

In India, Apple is doubling down on a bet it placed after the COVID-19 pandemic began and before Trump's reelection. Many countries, starting with the United States, were eager to reduce their reliance on factories in China. Apple, profoundly dependent on Chinese production, was quick to act.

Analysts at Counterpoint Research calculated that India had succeeded in satisfying 18% of the global demand for iPhones by early this year, two years after Foxconn started making iPhones in India. By the end of 2025, with the Devanahalli plant fully online, Foxconn is expected to be assembling between 25% and 30% of iPhones in India.

PC Shipments Remained Strong in Q2 Signaling Vendors Getting Ahead of Tariff Deadlines

PC shipments during the second quarter of 2025 grew 6.5% from the prior year, with global volumes reaching 68.4 million shipments, according to preliminary results from the International Data Corporation (IDC) Worldwide Quarterly Personal Computing Device Tracker.

Despite PC market growth in other geographies, the US market is starting to feel the pinch of import tariffs.

"We expected the US market to cool down this quarter given the inventory buildup to begin the year, but what we're witnessing here might highlight US PC demand slowing down in anticipation of the import tariffs looming deadline," said Jean Philippe Bouchard, research vice-president with IDC's Worldwide Mobile Device Trackers. "Despite a flat US PC market, the rest of the world demonstrated an appetite for PCs, fueled by an aging installed base and by a steady transition to Windows 11."

Top 5 Companies, Worldwide Traditional PC Shipments, Market Share, and Year-Over-Year Growth, Q2 2025 (Preliminary results, shipments are in millions of units)

Company	2Q25 Shipments	2Q25 Market Share	2Q24 Shipments	2Q24 Market Share	2Q25/2Q24 Growth
1. Lenovo	17.0	24.8%	14.7	23.0%	15.2%
2. HP Inc	14.1	20.7%	13.7	21.3%	3.2%
3. Dell Technologies	9.8	14.3%	10.1	15.7%	-3.0%
4. Apple	6.2	9.1%	5.1	8.0%	21.4%
5. ASUS	4.9	7.2%	4.2	6.6%	16.7%
Others	16.3	23.9%	16.3	25.4%	0.1%
Total	68.4	100.0%	64.2	100.0%	6.5%

Source: IDC Quarterly Personal Computing Device Tracker, July 8, 2025

Worldwide Server Market Value Will Reach 366 billion in 2025

According to the International Data Corporation (IDC) Worldwide Quarterly Server Tracker, the server market reached a record \$95.2 billion dollars in market value during the first quarter of the year, showing the highest quarterly growth rate ever with 134.1% increase compared to Q1 2024. This outstanding performance pushed the market projection up for the year to a record \$366.0 billion dollars for 2025 which represents a 44.6% growth compared to 2024.

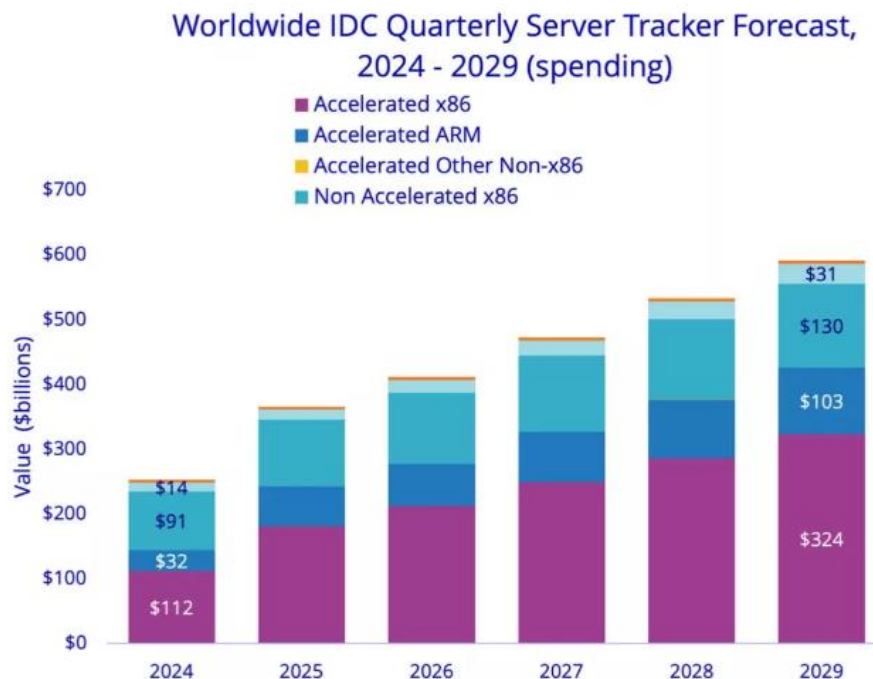
The x86 server market value is projected to increase 39.9% in 2025 to \$283.9 billion while Non-x86 servers will increase 63.7% year over year to \$82.0 billion. Servers with an embedded GPU are projected to grow 46.7% year-over-year representing almost 50% of the total market value in the year. The fast pace at which hyperscalers and cloud service providers continue adopting servers with embedded GPUs has fueled the server market growth which will be tripling in size in only three years. Thanks mainly to the launch of large rackscale configurations ARM based servers are rapidly gaining traction in the market by growing at 70.0% and representing 21.1% of the total shipments of the year.

The United States is the fastest growing region in the server market with an increase of 59.7% compared to 2024, representing almost 62% of the total revenue in 2025. China is also growing at a faster rate than other regions with 39.5% year-over-year growth in 2025 and accounting for more than 21% of the quarterly revenue worldwide. Japan, and APeJC had double-digit growth projected this year with 33.9% and 10.8% respectively. EMEA and Latin America showed single digit growth at 7.0% and 0.7%, while Canada is showing negative -9.6% growth due to an unusual very large deal in 2024.

Global Server Market Surges 134% in Q1 2025, While Intel Loses Ground to AMD and Arm

According to the latest data from IDC, the global server market grew by 134 percent year-over-year in Q1 2025, driven by a sharp increase in the deployment of GPU-embedded systems, which are essential for AI inferencing and training workloads. This segment is projected to grow at an annual rate of 46.7 percent and by the end of the year, it is expected to account for nearly 50 percent of the server market by value.

The report also notes that the GPU-embedded server segment has tripled over the past three years, fueled by continued investments from hyperscalers and cloud service providers.



The data additionally suggests that Arm-based servers are continuing to erode x86's market dominance, growing 39.9 percent year-over-year, with shipments expected to reach \$283.9 billion in 2025. Non-x86 servers overall are projected to grow by 63.7 percent this year, hitting \$82 billion. The surge is largely driven by high-density, rack-scale configurations designed for compute-heavy AI workloads.

The US remains at the forefront of this growth, accounting for approximately 62 percent of all server market revenue. Server shipments in the US are forecasted to grow by 59.7 percent year-over-year in 2025. China's server market is also expanding rapidly, with a projected 39.5 percent year-over-year growth for the same period.

Elsewhere, Japan, Asia, Europe, the Middle East, and Latin America are expected to grow between 10.8 percent and 33.9 percent in 2025. Canada is the only major market projected to contract, with a 9.6 percent decline attributed to what IDC describes as "an outsized acquisition in 2024 that skewed the comparative baseline."

US PC Market Grew 15% in Q1

According to the latest data from Canalys, shipments of desktops and notebooks reached 16.9 million units in the US in the first quarter – an increase of 15 percent compared to the same period a year earlier.

As we head into the back half of the year, however, vendors will be faced with clearing out excess inventory accumulated from tariff mitigation efforts. The situation, combined with what Canalys calls downward pressure on consumer spending, will result in a slowdown through the end of 2025. Once it is in the books, Canalys expects just a two percent annual increase in PC shipments.

Windows 10 is set to reach its end-of-life date in mid-October, which you'd think would trigger a large upgrade cycle among consumers. However, consumer PC shipments are expected to dip four percent year over year in 2025. The good news for vendors is that they will be offset by healthy growth in the business sector as commercial PC shipments are forecast to grow eight percent.

The reality of the matter is that many consumers likely aren't going to do anything about the Windows 10 end-of-life issue until it becomes a significant pain point, and that is not going to start becoming evident until at least a few months beyond the October 14 end date. As such, a boost in consumer PC shipments directly tied to Windows 10 won't occur until next year.

Worldwide Smartphone Market Grows 1.0% in Q2 2025

According to preliminary data from the International Data Corporation (IDC) Worldwide Quarterly Mobile Phone Tracker, global smartphone shipments increased 1.0% year-over-year (YoY) to 295.2 million units in the second quarter of 2025 (2Q25). The smartphone market remained positive, however uncertainty fueled by tariffs volatility, on-going macro-economic challenges such as forex instability, unemployment and inflation across regions have tapered demand, making consumers deprioritize spending on smartphones, especially in low-end segments.

Gartner Says Worldwide PC Shipments Increased 4.4% in Second Quarter of 2025

Worldwide PC shipments totaled more than 63 million units in the second quarter of 2025, a 4.4% increase from the second quarter of 2024, according to preliminary results by Gartner, Inc.

China's Economy Grows 5.2% on Strong Exports

China's economy expanded more than 5 percent in the second quarter, official data showed yesterday, buoyed by strong exports, but analysts said that more work was needed to address sluggish consumer demand.

The country's GDP grew 5.2 percent year-on-year during the April-to-June quarter, matching a prediction by an Agence France-Presse survey of analysts and topping an official growth goal for the year set by the government.

However, it marked a slowdown from the first quarter's 5.4 percent growth, which was boosted by exporters rushing to shift goods ahead of high US tariffs.

Gartner Forecasts Worldwide IT Spending to Grow 7.9% in 2025

Worldwide IT spending is expected to total \$5.43 trillion in 2025, an increase of 7.9% from 2024, according to the latest forecast by Gartner, Inc.

“While there is a business pause on net-new spending due to a spike in global uncertainty, the effect is subsumed by ongoing AI and generative AI (GenAI) digitization initiatives,” said John-David Lovelock, Distinguished VP Analyst at Gartner. “For instance, both software and services spending growth in 2025 is expected to slow down due to this ‘uncertainty pause,’ but spending in AI-related infrastructure, such as data center systems, continues to surge.

Gartner Data Snapshot: Preliminary Worldwide PC Vendor Unit Shipment Estimates for 2Q25 (Thousands of Units)

Company	2Q25 Shipments	2Q25 Market Share (%)	2Q24 Shipments	2Q24 Market Share (%)	2Q25-1Q24 Growth (%)
Lenovo	17,038	26.9	14,956	24.7	13.9
HP Inc.	14,124	22.3	13,692	22.6	3.2
Dell	9,832	15.6	10,140	16.7	-3.0
Apple	5,699	9.0	5,026	8.3	13.4
ASUS	4,486	7.1	4,128	6.8	8.7
Others	12,045	19.1	12,598	20.8	-4.4
Total	63,225	100.0	60,541	100.0	4.4

Notes: Data includes desktop and laptop PCs that are equipped with Windows, macOS and Chrome OS. All data is estimated based on a preliminary study. Final estimates will be subject to change. The statistics are based on shipments selling into channels. Numbers may not add up to totals shown due to rounding.

Source: Gartner (July 2025)

China's Exports Growth Tops Expectations in June; Rare Earth Shipments Surge 60% to Record High

China's exports growth beat expectations in June, buoyed by robust shipments to non-U.S. markets and as a temporary reprieve from U.S. tariffs helped slow the decline in goods sent to America.

Exports jumped 5.8% in June in U.S. dollar terms from a year earlier, customs data showed Monday, exceeding Reuters' poll estimates of a 5% rise.

Imports climbed 1.1% from a year earlier. While missing economists' expectations of a 1.3% rise, that marked the first time that imports have grown this year, reversing the trend of declining imports this year amid sluggish domestic demand.

China's exports to the U.S. dropped for a third month, falling over 16.1% in June, but the decline eased from the prior month amid a tariff truce. Imports in June dropped 15.5%. That compares with a 34% drop in exports in May, and imports decline of 18%.

The county's shipments to Southeast Asian nations surged 16.8% from a year ago and those to European Union countries jumped 7.6%, according to a CNBC calculation of the official trade data. Imports from these regions were little changed, rising 0.08% and 0.41%, respectively.

In the first half of this year, Chinese overall exports jumped 5.9% from a year earlier, while imports slumped 3.9%, customs data showed, with a trade surplus of \$585.96 billion — nearly 35% higher from a year earlier.

Despite the upbeat trade data for the first half of the year, economists forecast the export momentum could falter due to the heightened uncertainty over U.S. tariffs.

In June, China's exports of rare earths surged 60.3% to a record high of 7,742 tons, according to data on Wind Information going back to 2012, with buyers likely stockpiling materials ahead of the Aug. 12 deadline.

China's imports of rare earths, however, fell 13.7% from a year ago.

Apple's China iPhone Sales Grow for the First Time in Two Years

Apple iPhone sales in China rose in the second quarter of the year for the first time in two years, Counterpoint Research said, as the tech giant looks to turnaround its business in one of its most critical markets.

Sales of iPhones in China jumped 8% year-on-year in the three months to the end of June, according to Counterpoint Research. It's the first time Apple has recorded growth in China since the second quarter of 2023.

Apple's performance was boosted by promotions in May as Chinese e-commerce firms discounted Apple's iPhone 16 models, its latest devices, Counterpoint said. The tech giant also increased trade-in prices for some iPhone.

Apple's return to growth in China will be welcomed by investors who have seen the company's stock fall around 15% this year as it faces a number of headwinds.

U.S. President Donald Trump has threatened Apple with tariffs and urged CEO Tim Cook to manufacture iPhones in America, a move experts have said would be near-impossible. China has also been a headache for Apple since Huawei, whose smartphone business was crippled by U.S. sanctions, made a comeback in late 2023 with the release of a new phone containing a more advanced chip that many had thought would be difficult for China to produce.

Since then, Huawei has aggressively launched devices in China and has even begun dipping its toe back into international markets. The Chinese tech giant has found success eating away at some of Apple's market share in China.

Huawei's sales rose 12% year-on-year in the second quarter, according to Counterpoint. The firm was the biggest player in China by market share in the second quarter, followed by Vivo and then Apple in third place.

Apple Boosts U.S. Supply Chain With \$500 Million Rare Earth Magnet Deal

Following its commitment to spend more than \$500 billion in the U.S. over the next four years, Apple has announced a partnership with America's only fully integrated rare earth producer to buy American-made rare earth magnets.

In a press release, Apple announced that it's going to buy rare earth magnets developed at MP Materials' flagship Independence facility in Fort Worth, Texas. Apple says it will work with the firm to develop a "cutting-edge rare earth recycling line in Mountain Pass, California." Once it's ready, Apple wants to take in recycled rare earth feedstock and reprocess it for use in Apple products.

Once Apple and MP Materials "state-of-the-art" Texas factory has been built, Apple will ship American-made magnets across the country and globally, as demand for the material increases. Apple says it will support "dozen of new jobs in advanced manufacturing and R&D" as a result of the partnership.

Apple also plans to provide "extensive training to develop the workforce, building an entirely new pool of U.S. talent and expertise in magnet manufacturing."

Apple says that "nearly all magnets across Apple devices are made with 100% recycled rare earth elements," and this partnership with MP Materials will help "secure domestic supply of this critical material, strengthen the U.S. rare earth industry's capabilities to capture more raw material, and advance environmental progress with innovative recycling methods."

Amazon Now Employs Nearly as Many Robots as People in Its Warehouses

Amazon is now using more than one million robots in its warehouses, the most it has ever deployed, and there are now nearly as many robots in Amazon facilities as there are people, according to *The Wall Street Journal*.

Robots assist in a variety of functions, ranging from sorting items to packaging them for shipment. For example, a new robot named Vulcan can select products from different shelves to be packaged. Amazon told the *WSJ* that 75% of its global deliveries, or three in four packages, are facilitated in some way by robotics.

As Amazon relies more on robots for order fulfillment, it needs fewer human employees on staff. Amazon employs about 1.56 million people, with most working in warehouses. According to a *WSJ* analysis, the average number of employees per Amazon facility dropped to 670 people per warehouse last year, the lowest count in the past 16 years. It also found that Amazon employees are now more productive than they were a decade ago — the number of packages shipped per employee has skyrocketed from 175 in 2015 to about 3,870 last year.

Jassy wrote that as Amazon rolls out more AI features to its robots, the company "will need fewer people doing some of the jobs that are being done today," which will "reduce" Amazon's workforce over the "next few years."

Still, the company told the *WSJ* that it has trained more than 700,000 workers globally through apprenticeships for jobs that involve working with robots, such as robot technicians.

Windows 11 is Now the Most-used Desktop Operating System

Stat Counter data shows Windows 11 finally surpassing Windows 10, driven by upgrade prompts and gamer adoption

After nearly four years on the market, Windows 11 has finally pulled ahead of Windows 10 to become the most widely used desktop operating system, according to new data from Stat Counter.

Windows 11 now holds about 52% of the Windows market, cruising past Windows 10's 44.6%. It's a big milestone for Microsoft, especially with support for Windows 10 ending later this year.

The shift comes after a slow but steady climb for Windows 11, which lagged behind for years thanks to stricter hardware requirements and users' general reluctance to upgrade. Although the Windows 11 upgrade was free for Windows 10 users, many older PCs weren't eligible, leaving people to stick with Windows 10 or shell

out for a new machine. Plenty of those older Windows 10 computers are still out there, even though they're nearing a decade old.

Windows 11's growth has been driven in part by gamers. It became the most popular OS among PC gamers back in September, and its share has been climbing since then. Back in 2023, leaked data showed Windows 11 had hit over 400 million devices, it took twice as long as Windows 10 to reach that milestone.

Going forward, Microsoft is betting big on AI to drive new PC sales. Its upcoming Copilot+ PCs require neural processing units (NPUs) to access new AI features. For people already on Windows 10 with compatible hardware, Windows 11 is still a free upgrade, although there are ongoing complaints about ads, bloatware, and the need for an internet connection and Microsoft account during setup.

In June, Microsoft started offering Windows 10 users a free year of security updates — if they turned on Windows Backup and synced their documents to OneDrive. Otherwise, they'll have to pay \$30 a year for updates starting October 14, when Windows 10 officially reaches end of support.

Samsung Confirms Its Tri-fold Phone is Coming Later This Year

Roh Tae-moon, acting head of Samsung Electronics' Device Experience Division, told The Korea Times that "We are working hard on a tri-fold smartphone with the goal of launching it at the end of this year."

Roh also said that Samsung is currently focusing on perfecting the phone and its usability. He added that the company has not yet decided on a name, but a final decision would be made soon as the handset nears completion. This would contradict earlier reports that the tri-fold phone would be called the Galaxy G Fold.

Quoting another unnamed Samsung executive, Android Authority writes that the triple-screen phone is ready to be put into production, but the company worries that consumers aren't "clearly" asking for the product. The person added that Samsung is now investigating potential consumer demand.

It was previously reported that Samsung will test the waters with the tri-fold phone by making it in limited numbers and releasing it in only two markets: its home country of South Korea and China.

With the all-new Z Fold 7 priced at a wallet-crushing \$1,999, expect a trifold device to be even more expensive. Some rumors say it might be between \$3,000 and \$3,500, depending on what model buyers choose.

According to reported specs, the trifold will feature a fairly standard 6.49-inch outer display in its folded mode but can stretch to almost 10 inches when fully opened.

Samsung won't be the first company to release a tri-fold phone. Huawei has the Mate XT Ultimate (above), which costs \$2,800, has two hinges, and reaches 10.2 inches when unfolded. It's proved to be a commercial success inside China — by luxury phone standards — outselling every other \$2 000-plus foldable and boosting Huawei's foldable share to 76 % in the country. However, fewer than half a million units have shipped, illustrating that it's still a niche product.

23.

Top 100 Connector Manufacturers

Research Report M-121-25
August 2025

Top 100



Bishop & associates, inc.

Performance and Forecast of the World Connector Industry

Top 100



Bishop & Associates has just released a new ten-chapter research report providing a comprehensive analysis of the world's Top 100 Electronic Connector Manufacturers. This new report furnishes detailed statistics that benchmark the leading connector manufacturers by 2023/2024 total sales, sales by end-use equipment market, sales by product category, and sales by region. All manufacturers are exhibited by 2024 sales and are ranked by region of the world with percentage year-to-year change. This report provides all the key data needed to analyze the sales performance of each of the top 100 worldwide electronic connector suppliers.

The world's top 100 connector manufacturers recorded shipments of \$70.060 billion in 2024. This represented 81.0% of the worldwide connector market, down from 82.4% in 2023. The balance of the connector industry had shipments of \$16.417 billion in 2024 and represented 19.0% of the total market.

Over the last decade, we have identified more than 750 connector manufacturers, many of which have been acquired by larger companies or consolidated to form new connector companies. In fact, if you were to review the list of top 100 connector companies in 2000 with the list of top 100 connector companies in 2024, you would see that a large percentage of the companies listed in 2000 were acquired by other companies. In fact, in just the last several years, names like CONEC, ERNI, Positronic, Genesis Connector Technology, and Winchester, all at one time, top 100 place holders have been acquired. It doesn't appear this consolidation will end anytime soon. In 2023 we lost Carlisle Interconnect (#24 in 2023) when they were acquired by Amphenol, and in 2025 we will lose CommScope (#25 in 2024) and AirBorn (#41 in 2024). CommScope will be folded in with Amphenol and AirBorn will become part of Molex.

These changes are allowing new companies to appear on Bishop's list of top 100 connector manufacturers. Companies like Qnnect, a portfolio company comprised of connector manufacturers such as Cristek, Fil-Con, Connectronics, and Meritec/Joy Signal, are now listed as the 27th largest connector manufacturer. And a company like Southwest Microwave, who offers a highly focused product offering, is now part of the top 100. As would be expected, we anticipate continuing to discover additional connector companies, especially in China and other developing countries, as well as non-connector companies who are expanding their current product offering to include interconnect, or who are developing application specific connectors to support their other products.

The table on the following page shows percent of sales for the top 100 connector manufacturers, and all other connector manufacturers by geographic region.

Top 100 by Geographic Region - 2024 Sales

Region	1 - 100 Sales	All Other Sales	Total World
North America	XX.X%	X.X%	XX.X%
Europe	XX.X%	X.X%	XX.X%
Japan	3.9%	0.8%	4.7%
China	XX.X%	X.X%	XX.X%
Asia Pacific	XX.X%	X.X%	XX.X%
ROW	2.2%	1.8%	3.9%
Total World	81.0%	19.0%	100.0%

The following table of contents shows the detail provided in the updated version of this report.

Table of Contents

Chapter 1 – Overview of the Top 100 Connector Manufacturers

Top 100 Connector Manufacturers - 2024 Shipments
 2024 Average Sales per Manufacturer
 Top 100 Percent of 2024 Sales by Geographic Region
 2024 Total World Sales by Geographic Region
 Top 100 Percent of 2023 Sales by Geographic Region
 2023 Total World Sales by Geographic Region
 Top 100 Connector Manufacturers by Base of Origin
 North America
 Europe
 Japan
 Asia Pacific
 China
 The Top 10
 Top 10 Share of World Market 1980 - 2024
 World's Top 10 Connector Manufacturers 2019 and 2024 Sales with 5-Year CAGR
 2019 vs. 2024 Connector Sales by Region
 Top 50 Worldwide Connector Manufacturers
 Top 50 Manufacturers by Geographic Region
 2024 Sales by Geographic Region
 Top 50 Sales - 2023 vs. 2024
 Industry Sales Performance YTD December 2024 USD-vs-Local Currencies
 2023 vs. 2024 Sales – 2024 Top 50 Connector Manufacturers
 2024 Top 50 – 2024 vs. 2023 Sales by Ranking
 Top 50 Connector Manufacturers Year-to-Year Percent Change
 Connector Manufacturers Ranked 51-100
 Connector Manufacturers Ranked 51-100 – 2024 Sales by Geographic Region
 Connector Manufacturers Ranked 51-100 – 2023 vs. 2024
 2023 vs. 2024 Connector Sales of Manufacturers Ranked 51 - 100
 2024 Manufacturers Ranked 51 to 100, 2024 vs 2023 Sales by Ranking
 Connector Manufacturers Ranked 51-100 Year-to-Year Percent Change
 2024 vs. 2023 Regional Sales Summary

Chapter 2 – Top 10 Electronic Connector Manufacturers

Top 10 Worldwide Connector Manufacturers
 Top 10 Shipments by End-Use Equipment
 Top 10 by End-Use Equipment Sector
 Top 10 Shipments by Product Category
 Top 10 by Connector Product Category
 Overview of the Top 10 Manufacturers
 #1 – TE Connectivity
 TE Connectivity Worldwide Connector Sales by Region
 TE Connectivity Worldwide Connector Sales Percent by End-Use Equipment & Product Category
 #2 - Amphenol
 Amphenol Worldwide Connector Sales by Region
 Amphenol Worldwide Connector Sales Percent by End-Use Equipment & Product Category
 #3 – Molex
 Molex Worldwide Connector Sales by Region
 Molex Worldwide Connector Sales Percent by End-Use Equipment & Product Category
 #4 – Aptiv
 Aptiv Worldwide Connector Sales by Region
 Aptiv Worldwide Connector Sales Percent by End-Use Equipment & Product Category
 #5 – Foxconn (FIT)
 Foxconn (FIT) Worldwide Connector Sales by Region
 Foxconn (FIT) Worldwide Connector Sales Percent by End-Use Equipment & Product Category
 #6 – Luxshare Precision
 Luxshare Precision Worldwide Connector Sales by Region
 Luxshare Precision Worldwide Connector Sales Percent by End-Use Equipment & Product Category
 #7 – Yazaki
 Yazaki Worldwide Connector Sales by Region
 Yazaki Worldwide Connector Sales Percent by End-Use Equipment & Product Category
 #8 - Rosenberger
 Rosenberger Worldwide Connector Sales by Region
 Rosenberger Worldwide Connector Sales Percent by End-Use Equipment & Product Category

TOP 100 CONNECTOR MANUFACTURERS

Chapter 2 – Top 10 Electronic Connector Manufacturers (continued)

#9 – BizLink Technology Inc
BizLink Technology Inc. Worldwide Connector Sales by Region
BizLink Technology Inc. Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#10 – JAE
JAE Worldwide Connector Sales by Region
JAE Worldwide Connector Sales Percent by End-Use Equipment & Product Category
Summary of the Top 10 Connector Manufacturers
Top 10 - Sales by Region
Top 10 - End-Use Equipment Markets
Top 10 - by Product Categories

Chapter 3 – Electronic Connector Manufacturers Ranked 11 through 20

Connector Manufacturers Ranked 11 through 20
Connector Manufacturers Ranked 11 through 20 by End-Use Equipment
Connector Manufacturers Ranked 11 through 20 by End-Use Equipment Sector
Connector Manufacturers Ranked 11 through 20 by Product Category
Connector Manufacturers Ranked 11 through 20 by Connector Product Category
Overview of Connector Manufacturers Ranked 11 through 20
#11 – Hirose Electric
Hirose Worldwide Connector Sales by Region
Hirose Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#12 – JONHON
JONHON Worldwide Connector Sales by Region
JONHON Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#13 - Sumitomo Wiring Systems
Sumitomo Wiring Systems Worldwide Connector Sales by Region
Sumitomo Wiring Systems Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#14 – J.S.T.
J.S.T. Worldwide Connector Sales by Region
J.S.T. Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#15- LOTES Co. Ltd
OTES Co. Ltd Worldwide Connector Sales by Region
OTES Co. Ltd Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#16 - Phoenix Contact
Phoenix Contact Worldwide Connector Sales by Region
Phoenix Contact Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#17 – Samtec
Samtec Worldwide Connector Sales by Region
Samtec Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#18 – HARTING
HARTING Worldwide Connector Sales by Region
HARTING Worldwide Connector Sales Percent by End-Use Equipment & Product
#19 – Korea Electric Terminal Co., Ltd
Korea Electric Terminal Worldwide Connector Sales by Region
Korea Electric Terminal Worldwide Connector Sales Percent by End-Use Equipment
#20 – Eaton/Souriau
Eaton/Souriau Worldwide Connector Sales by Region

Chapter 3 – Electronic Connector Manufacturers Ranked 11 through 20 (continued)

Eaton/Souriau Worldwide Connector Sales Percent by End-Use Equipment & Product Category
Summary of Connector Companies Ranked 11 through 20
Connector Companies Ranked 11 through 20 - Sales by Region
Connector Companies Ranked 11 through 20 - End-Use Equipment Markets
Connector Companies Ranked 11 through 20 - by Product Categories

Chapter 4 – Electronic Connector Manufacturers Ranked 21 through 30

Connector Manufacturers Ranked 21 through 30
Connector Manufacturers Ranked 21 through 30 by End-Use Equipment
Connector Manufacturers Ranked 21 through 30 by End-Use Equipment Sector
Connector Manufacturers Ranked 21 through 30 by Product Category
Connector Manufacturers Ranked 21 through 30 by Connector Product Category
Overview of Connector Manufacturers Ranked 21 through 30
#21 – Glenair
Glenair Worldwide Connector Sales by Region
Glenair Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#22 – Shenzhen Deren Electric Co., Ltd.
Shenzhen Deren Electric Co., Ltd Worldwide Connector Sales by Region
Shenzhen Deren Electric Co., Ltd Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#23 – HUBER+SUHNER
HUBER+SUHNER Worldwide Connector Sales by Region
HUBER+SUHNER Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#24 – Belden
Belden Worldwide Connector Sales by Region
Belden Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#25 – CommScope
CommScope Worldwide Connector Sales by Region
CommScope Worldwide Connector Sales Percent by End-Use Equipment & Product
#26 –ITT Cannon
ITT Cannon Worldwide Connector Sales by Region
ITT Cannon Worldwide Connector Sales Percent by End-Use Equipment & Product
#27 – Qnnect
Qnnect Worldwide Connector Sales by Region
Qnnect Worldwide Connector Sales Percent by End-Use Equipment
#28 – LEMO S.A.
LEMO Connector Sales by Region
LEMO Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#29 – KYOCERA/AVX
KYOCERA/AVX Worldwide Connector Sales by Region
KYOCERA/AVX Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#30 – IRISO Electronics.
IRISO Electronics Worldwide Connector Sales by Region
IRISO Electronics Worldwide Connector Sales Percent by End-Use Equipment & Product Category

TOP 100 CONNECTOR MANUFACTURERS

Chapter 4 – Electronic Connector Manufacturers Ranked 21 through 30

IRISO Electronics Worldwide Connector Sales Percent by End-Use Equipment & Product Category
Summary of Connector Manufacturers Ranked 21 through 30
Connector Manufacturers Ranked 21 through 30 - Sales by Region
Connector Manufacturers Ranked 21 through 30 - End-Use Equipment Markets
Connector Manufacturers Ranked 21 through 30 - by Product Categories

Chapter 5 – Electronic Connector Manufacturers Ranked 31 through 40

Electronic Connector Manufacturers Ranked 31 through 40
Electronic Connector Manufacturers Ranked 31 through 40 by End-Use Equipment
Electronic Connector Manufacturers Ranked 31 through 40 by End-Use Equipment Sector
Electronic Connector Manufacturers Ranked 31 through 40 by Product Category
Electronic Connector Manufacturers Ranked 31 through 40 by Connector Product Category
Overview of Electronic Connector Manufacturers Ranked 31 through 40
#31 – Radiall
Radiall Connector Sales by Region
Radiall Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#32 – Corning Inc
Corning Worldwide Connector Sales by Region
Corning Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#33 – Hosiden
Hosiden Worldwide Connector Sales by Region
Hosiden Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#34 – ODU GmbH & Co. KG
ODU Worldwide Connector Sales by Region
ODU Worldwide Connector Sales Percent by End-Use Equipment & Product
#35 – Fujikura/DDK Ltd
Fujikura/DDK Ltd Worldwide Connector Sales by Region
Fujikura/DDK Ltd Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#36 – Weidmüller Interface GmbH & Co. KG
Weidmüller Worldwide Connector Sales by Region
Weidmüller Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#37 – Bel Connectivity
Bel Connectivity World Connector Sales by Region
Bel Connectivity Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#38 – Yamaichi
Yamaichi Worldwide Connector Sales by Region
Yamaichi Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#39 – Smiths Interconnect
Smiths Worldwide Connector Sales by Region
Smiths Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#40 – WAGO
WAGO Worldwide Connector Sales by Region
WAGO Worldwide Connector Sales Percent by End-Use Equipment & Product Category
Summary of Electronic Connector Manufacturers Ranked 31 through 40

Chapter 5 – Electronic Connector Manufacturers Ranked 31 through 40 (continued)

Electronic Connector Manufacturers Ranked 31 through 40 - Sales by Region
Electronic Connector Manufacturers Ranked 31 through 40 - End-Use Equipment Markets
Electronic Connector Manufacturers Ranked 31 through 40 - by Product Categories

Chapter 6 – Electronic Connector Manufacturers Ranked 41 through 50

Electronic Connector Manufacturers Ranked 41 through 50
Electronic Connector Manufacturers Ranked 41 through 50 by End-Use Equipment
Electronic Connector Manufacturers Ranked 41 through 50 by End-Use Equipment Sector
Electronic Connector Manufacturers Ranked 41 through 50 by Product Category
Electronic Connector Manufacturers Ranked 41 through 50 by Connector Product Category
Overview of Electronic Connector Manufacturers Ranked 41 through 50
#41 – AirBorn
AirBorn Worldwide Connector Sales by Region
AirBorn Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#42 – Electric Connector Tech Co., Ltd
Electric Connector Worldwide Connector Sales by Region
Electric Connector Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#43 – Lear Corporation
Lear Worldwide Connector Sales by Region
Lear Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#44 – I-PEX
I-PEX Worldwide Connector Sales by Region
I-PEX Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#45 – Hu Lane Associate Inc
Hu Lane Worldwide Connector Sales by Region
Hu Lane Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#46 – Speed Tech Corp
Speed Tech Worldwide Connector Sales by Region
Speed Tech Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#47 – 3M Interconnect Products
3M Worldwide Connector Sales by Region
3M Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#48 – Aces Electronic Co., Ltd
Aces Electronic Worldwide Connector Sales by Region
Aces Electronic Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#49 – LAPP Holding
LAPP Worldwide Connector Sales by Region
LAPP Worldwide Connector Sales Percent by End-Use Equipment & Product Category
#50 – Yokowo Co., Ltd
Yokowo Worldwide Connector Sales by Region
Yokowo Worldwide Connector Sales Percent by End-Use Equipment & Product Category
Summary of Electronic Connector Manufacturers Ranked 41 through 50
Electronic Connector Manufacturers Ranked 41 through 50 - Sales by Region

TOP 100 CONNECTOR MANUFACTURERS

Chapter 6 – Electronic Connector Manufacturers Ranked 41 through 50 (continued)

Electronic Connector Manufacturers Ranked 41 through 50 - End-Use Equipment Markets
Electronic Connector Manufacturers Ranked 41 through 50 - by Product Categories

Chapter 7 – Balance of Top 100 Electronic Connector Manufacturers

Connector Manufacturers 51-100 - 2024 Shipments
2024 Shipments by Region of the World
2024 Sales by Geographic Region
Market Share by Region of the World
2024 Market Share by Geographic Region
Connector Manufacturers Ranked #51 - #100

Chapter 8 – Top 100 Electronic Connector Manufacturers by Region of the World

2024 Shipments by Region of the World
Top 100 Connector Manufacturers Sorted by Total World Shipments
Top 100 Connector Manufacturers Sorted by North American Shipments
Top 100 Connector Manufacturers Sorted by European Shipments

Chapter 8 – Top 100 Electronic Connector Manufacturers by Region of the World (continued)

Top 100 Connector Manufacturers Sorted by Japanese Shipments
Top 100 Connector Manufacturers Sorted by Chinese Shipments
Top 100 Connector Manufacturers Sorted by Asia Pacific Shipments
Top 100 Connector Manufacturers Sorted by ROW Shipments Shipments

Chapter 9 – Shipments Ranked by Region, End-Use Equipment & Product Category

Top 10 Manufacturers Market Share Ranking by Region
Top 100 Connector Manufacturers Ranked by Region
Top 50 Connector Manufacturers Ranked by End-Use Equipment Sector
Summary Top 50 Connector Manufacturers by End-Use Equipment Sector
Top 50 Connector Manufacturers Ranked by Product Category
Summary Top 50 Connector Manufacturers by Product Category

Chapter 10 – Top 100 Connector Manufacturers – Percent Market Share by Region

Top 100 Connector Manufacturers – Percent Market Share by Region



To Order the Top 100 Connector Manufacturers

Research Report M-121-25, *The Top 100 Connector Manufacturers – 2025* is available for \$5,285. If you would like additional information about this report, or would like to place an order, please complete the following information, and e-mail, or mail it to Bishop & Associates, Inc. To place your order on our website: <https://bishop-research.com/>.

Name:		
Title:		
Company:		
Address:		
City:	State:	Zip:
Phone:	Fax:	
E-Mail Address:		
Signature:		

Top 100 Connector Manufacturers - 2025

☐ Multi-User Corporate License @ \$5,285

☐ Invoice Me ☐ Check Enclosed ☐ Visa ☐ Master Card ☐ American Express

Illinois Customers Add 8.0% Sales Tax

Credit Card No.

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Expiration Date

--	--

Mo.

--	--

Yr.



1209 Fox Glen Drive - St. Charles, IL 60174

Phone: 630.443.2702

E-mail: bishop@bishopinc.com

Website: www.connectorindustry.com

Online Store: <https://bishop-research.com/>

What's New ?

Bishop & Associates has recently completed several new research reports about the worldwide connector industry. A table of contents for each report can be found at <https://bishop-research.com>.

<input type="checkbox"/> Report M-121-25	2025 Top 100 Connector Manufacturers (August 2025) NEW
<input type="checkbox"/> Report C-122-25	Connector Industry Yearbook (June 2025) NEW
<input type="checkbox"/> Report F-2025-01	Connector Industry Forecast (May 2025) NEW
<input type="checkbox"/> Report P-780-25	World RF Coax Connector Market (April 2025) NEW
<input type="checkbox"/> Report M-700-25	World Connector Market Handbook (March 2025) NEW
<input type="checkbox"/> Report C-150-24	History of M&A in the Connector Industry 1950-2024 (October 2024) NEW
<input type="checkbox"/> Report P-520-24	The Rectangular Input/Output Connector Market 2024 (July 2024) NEW
<input type="checkbox"/> Report P-799-24	World Cable Assembly Market (February 2024)
<input type="checkbox"/> Report P-606-23	Connector Types and Technologies Poised for Growth (October 2023)
<input type="checkbox"/> Report M-720-23	European Connector Market 2021, 2022, 2023F and 2028F (June 2023)
<input type="checkbox"/> Report P-430-23	World Circular Connector Market 2023 (May 2023)
<input type="checkbox"/> Report M-1200-22	Military Ground Vehicle Market for Connectors (October 2022)
<input type="checkbox"/> Report P-675-22	Copper and Fiber Connectivity in the Data Center (July 2022)
<input type="checkbox"/> Report T-800-22	2022 North American Cable Assembly Manufacturers (May 2022)
<input type="checkbox"/> Report M-1010-22	World Automotive Connector Market (April 2022)
<input type="checkbox"/> Report P-420-22	IC Sockets – Systems & Connector Forecast 2020-2030 (January 2022)
<input type="checkbox"/> Report M-310-21	Instrumentation Market for Connectors (June 2021)
<input type="checkbox"/> Report P-410-21	Computer Server Market Trends and Connector Use 2020 – 2030 (May 2021)

THE BISHOP REPORT - CONNECTOR INDUSTRY YEARBOOK

An annual corporate subscription to [THE BISHOP REPORT](#) (12 issues) is available for \$2,950, which includes an unlimited number of subscribers and one PDF version of the **Connector Industry Yearbook** report (normally \$1,500).

The Bishop Report subscription includes access, through [Bishopinc.com](https://bishopinc.com), to prior issues of The Bishop Report, 30-40 yearly News Briefs, Industry Financial Benchmarks, and various connector industry indices.

[Click here](#) to view the expanded report description, and complete table of contents, for all Bishop & Associates' research reports.


Performance and Forecast of the World Connector Industry
Bishop & Associates Inc.
1209 Fox Glen Drive • St. Charles, IL 60174
Phone: 630.443.2702 • bishop@bishopinc.com • [Bishopinc.com](https://bishopinc.com)
Online Ordering: <https://bishop-research.com>