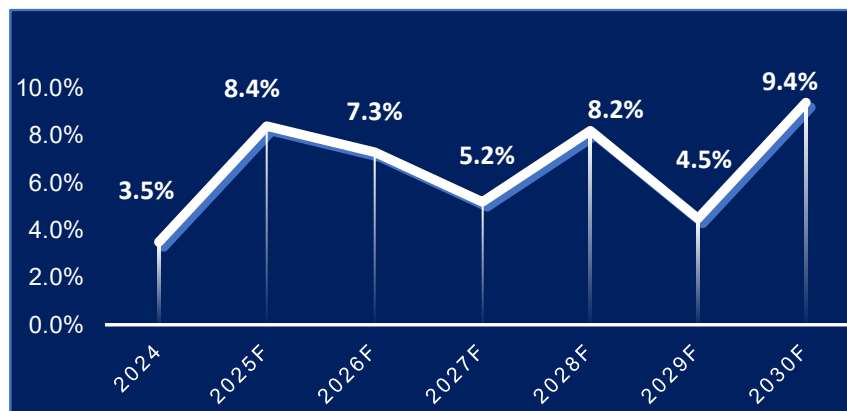


# Connector Industry Forecast

Research Report F-2025-02  
December 2025





Bishop & Associates has just released the updated version of the 2025 **Connector Industry Forecast**. This eight-chapter report provides an in-depth, and detailed forecast of the worldwide connector industry. In addition to the detailed forecasts for each region of the world (North America, Europe, Japan, China, Asia Pacific, and ROW), an industry overview is included which provides current market trends, currency fluctuation effects, and industry sales performance, as well as an outlook narrative.

Worldwide and each regional forecast includes:

## Computers & Peripherals

- Mobile Computers
- Desktops
- Servers
- Storage Equipment
- Input/Output Equipment
- Communication LAN Devices
- Other Computer Equipment

## Business/Office Equipment

- Retail/POS Equipment
- Imaging Systems
- Other Business/Office Equipment

## Instrumentation

- Automatic Test Equipment
- Analytical/Scientific Instruments
- Other Instrumentation

## Medical Equipment

- Diagnostic & Imaging Equipment
- Therapeutic Equipment
- Other Medical Equipment

## Industrial

- Factory Automation and Machinery
- Construction and Civil Engineering
- Energy Markets
- Other Industrial Equipment

## Automotive

- Body Wiring & Power Distribution
- Powertrain
- Comfort, Convenience & Entertainment
- Navigation & Instrumentation
- Safety & Security

## Transportation (non-auto)

- Commercial Vehicles
- RVs & Power Sports
- Commercial Air
- Marine
- Rail
- Construction
- Farm & Garden

## Military/Aerospace

## Telecom/Datacom

- Carrier Network
- Enterprise Network
- Wireless Infrastructure
- Subscriber Equipment
- Other Telecommunications

## Consumer

- Personal/Portable Consumer Electronics
- Consumer Entertainment Electronics
- Consumer White Goods
- Other Consumer

## 2025– Not the Year we Anticipated

What a year! I don't think when we made our initial forecast at the beginning of 2025, that anyone had anticipated 2025 to be as strong as it appears it will be. We had agreed it was going to be a year of growth for both bookings and billings, but it has been over four years (2021) since we have seen year-over-year bookings as strong as they were this summer and this last half of 2025. The same can be said about billings, with seven out of the last nine months showing double-digit year-over-year growth.

After growing +5.6% in 2024, we are predicting that the connector industry will have year-over-year growth of +12.5% in 2025, the strongest year-over-year growth we have seen since the industry made its strong comeback the year following the COVID shutdown. As is expected, not all regions are performing as well as others, with several regions showing double-digit growth, and others showing low single-digit year-over-year growth.

Unlike previous years, when the summer months reflected a period of factory shutdowns and employee vacations, in 2025, the summer months represented the beginning of double-digit year-over-year and year-to-date growth in bookings and billings. With such strong bookings, it was easy to anticipate the remainder of 2025 to experience positive growth.

## Industry Sales Performance by Region

In 2024, as seen by the table below, growth and decline were not equal across all regions, nor will they be in 2025. The Asia Pacific region saw the greatest growth in 2024, growing +19.2%. With growth of +12.1%, the Chinese region followed Asia Pacific. The only other region showing an increase was North America, where sales increased +6.8%. All other regions declined in 2024, with the greatest decline in the ROW region, where sales in US dollars decreased -15.7%, followed by Japan with a decline of -13.8%. Europe, the only other region declining, showed a decrease of -3.2%.

**2023 and 2024 Connector Sales by Region  
With Percent Change**

Region	2023	2024	Percent Change
North America	\$18,840.8	\$20,124.7	6.8%
Europe	\$17,992.7	\$17,417.3	-3.2%
Japan	\$4,683.7	\$4,035.8	-13.8%
China	\$24,977.1	\$28,003.5	12.1%
Asia-Pacific	\$11,310.0	\$13,483.5	19.2%
ROW	\$4,049.8	\$3,412.9	-15.7%
<b>Total World</b>	<b>\$81,854.1</b>	<b>\$86,477.7</b>	<b>5.6%</b>

\$ Millions

## Connector Industry Forecast

Assessing predicted performance in 2025, Asia Pacific, who was ranked number two in 2024, is anticipated to move up to the number one spot in 2025, with sales increasing a staggering +XX.5%. The Asia Pacific region will be followed by China, where sales are anticipated to increase +XX.2% in 2025. All other regions are projected to grow in the single digits, with North America increasing +X.X%, followed by Europe at +X.X%, the Japanese region at +X.X% and the ROW at +X.X%.

**2024 and 2025F Connector Sales by Region  
With Percent Change**

Region	2024	2025F	Percent Change
North America	\$20,124.7	\$XX,XXX.X	Y.Y%
Europe	\$17,417.3	\$XX,XXX.X	Y.Y%
Japan	\$4,035.8	\$X,XXX.3	Y.Y%
China	\$28,003.5	\$XX,XXX.X	Y.Y%
Asia-Pacific	\$13,483.5	\$X,XXX.X	Y.Y%
ROW	\$3,412.9	\$X,XX9.1	Y.8%
<b>Total World</b>	<b>\$86,477.7</b>	<b>\$XX,XXX.X</b>	<b>Y.Y%</b>

\$ Millions

In addition to connector sales results varying by region in 2024, electronic connector sales also varied remarkably by market sector. As the table below shows, in 2024, the computer & peripherals equipment/market sector saw the greatest percentage growth, at +10.7%. It is interesting to note that this was the first time since 2006 that the computer & peripherals market sector outperformed all other sectors!

**2023 and 2024 Connector Sales by Market Sector  
With Percent Change**

Equipment Sector	2023	2024	YOY Change
Computers & Peripherals	\$9,979.5	\$11,050.4	10.7%
Business/Office Equipment	\$875.4	\$878.3	0.3%
Instrumentation	\$2,364.8	\$2,428.4	2.7%
Medical	\$2,659.7	\$2,720.2	2.3%
Industrial	\$10,742.3	\$11,062.9	3.0%
Automotive	\$18,502.7	\$19,149.2	3.5%
Transportation	\$5,857.4	\$6,025.2	2.9%
Military/Aerospace	\$5,092.7	\$5,291.8	3.9%
Telecom/Datacom	\$18,991.4	\$20,860.9	9.8%
Consumer	\$3,744.4	\$3,890.5	3.9%
Other Equipment	\$3,043.8	\$3,119.9	2.5%
<b>Total World</b>	<b>\$81,854.1</b>	<b>\$86,477.7</b>	<b>5.6%</b>

\$ Millions

## 2025 and Beyond Outlook

With industry backlog remaining strong, Bishop is forecasting 2025 sales to increase +Y.Y% to \$XX,XXX million. We anticipate the greatest percentage increase will occur in the Asia Pacific region, where sales will increase +Y.Y%, followed by the Chinese region where sales are anticipated to increase +Y.Y%. When looking at growth in U.S. dollars, although not the greatest increase percentage wise, the largest increase in sales will be seen in the Chinese region, where connector sales will increase by \$X,XXX.X million. The Chinese region will be followed by the North American region, where sales in US dollars will increase \$X,XXX.X million.

### 2024 and 2025F Connector Forecast by Geographic Region With Percent Change

Region	2024	2025F	Percent Change
North America	\$20,124.7	\$XX,XXX.X	Y.Y%
Europe	\$17,417.3	\$XX,XXX.X	Y.Y%
Japan	\$4,035.8	X,X24.9	Y.Y%
China	\$28,003.5	\$XX,XXX.X	Y.Y%
Asia-Pacific	\$13,483.5	\$XX,XXX.X	Y.Y%
ROW	\$3,412.9	\$3,502.6	2.6%
<b>Total World</b>	<b>\$86,477.7</b>	<b>\$XX,XXX.X</b>	<b>Y.Y%</b>

\$ Millions

### 2024 and 2025F Connector Forecast by Market Sector With Percent Change

Equipment Sector	2024	2025F	Percent Change
Computers & Peripherals	\$11,050.4	\$XX,XXX.X	Y.Y%
Business/Office Equipment	\$878.3	\$94X.X	Y.Y%
Instrumentation	\$2,428.4	\$X,X16.X	Y.Y%
Medical	\$2,720.2	\$X,88X.X	Y.Y%
Industrial	\$11,062.9	\$X2,X5X.X	Y.Y%
Automotive	\$19,149.2	\$XX,XXX.X	Y.4%
Transportation	\$6,025.2	\$X,XXX.X	Y.Y%
Military/Aerospace	\$5,291.8	\$X,XXX.X	Y.Y%
Telecom/Datacom	\$20,860.9	\$2X,XXX.X	Y.Y%
Consumer	\$3,890.5	\$X,X8X.X	Y.1%
Other Equipment	\$3,119.9	\$3,XXX.X	8.7%
<b>Total World</b>	<b>\$86,477.7</b>	<b>\$XX,XXX.X</b>	<b>Y.Y%</b>

\$ Millions

## Forecast Assumptions

During times of world economic and geopolitical uncertainty it is very difficult to project future business conditions. Increased volatility as well as the presence of unexpected and random events that are difficult to anticipate can greatly affect economic indicators like unemployment, trade policies, or inflation. Consider the following economic headwinds, political challenges, and uncertainties.

- Instability in the worldwide economy. As announced by the International Monetary Fund, “while the near-term forecast is revised up modestly, global growth remains subdued, as the newly introduced policies slowly come into focus.” They continue by stating that “the overall environment remains volatile, and temporary factors that supported activity in the first half of 2025—such as front-loading—are fading. Similar sentiment is being dictated by the World Economic Forum, who states “the global economy is entering a period of weak growth and systemic disruption, and that “some 72% of surveyed chief economists expect the global economy to weaken over the next year, amid intensifying trade disruption, rising policy uncertainty and accelerating technological change.” All fundamental changes that will play out in future trade, fiscal policy, and debt, and that could potentially spiral into areas like the financial markets and monetary policies. It was also noted “with global public debt levels mounting, the chief economists surveyed highlight that debt vulnerabilities, once largely associated with emerging economies, are increasingly centered in advanced ones – 80% expect risks in advanced economies to grow in the year ahead. Fiscal vulnerabilities are also more frequently identified among the top growth inhibitors in advanced economies (41%) compared to developing economies (12%).” It will be interesting to hear the outcome of the World Economic Forum’s annual meeting in January 2026 taking place in Davos Switzerland.
- Although in the U.S., the Fed dropped interest rates by 0.25 percentage points in September and October of 2025, the lowest level in three years, many are still concerned if this will be enough to keep growth steady, in the face of continuing economic uncertainty. With the supposed plan of giving a boost to the economy, lower interest rates make it cheaper to borrow money and in turn, prompt businesses to take out loans to expand production and hire more people. There is also hope and speculation that the drop will correlate to a drop in mortgage rates, which have been hovering around 7% over the last couple of years. Unfortunately, because a drop in interest rates primarily affects the rates banks use to lend money to each other, it is not going to affect the “interest rate spread” or the interest rates paid by businesses and consumers in the same way. Thus, making it highly unlikely that mortgage interest rates are going to drop drastically in the next few months. Also, there is still some question as to how the drop in the U.S. will affect the global central banks. Many feel that these cuts are a definite sign of economic conditions worsening worldwide, prompting many other countries to also look at cutting interest rates. Note: there is still a good chance that the Fed will cut interest rates by an additional 0.25 percentage points one more time before the year is over.

In addition to these, other forecast assumptions will also be discussed, these will cover supply chain issues, political tensions, labor issues, as well as tariffs, commodity prices, and cybersecurity to name a few.

## Connector Industry Forecast

There are also some interesting projections as to why we will see connector growth in 2026 and beyond, and what that growth will be. These include factors such as strong bookings, historical growth, and low unemployment coupled with strong consumer spending.

This report details the markets where Bishop anticipates growth, and which subsectors will drive that growth. This report provides projections for the period 2025F through 2030F, with year-over-year percent change and five-year CAGR by region, market sector, and sub-sector. Will the industry continue to grow, and which years may not be as strong as others? These answers and more are revealed in the December 2025 **Connector Industry Forecast**.



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

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 Body Wiring & Power Distribution  
 Powertrain  
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- Imaging Systems
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- Instrumentation
- Automatic Test Equipment
- Analytical & Scientific Instruments
- Other Instruments
- Medical
- Diagnostic & Imaging Equipment
- Therapeutic Equipment
- Other Medical Equipment
- Industrial
- Heavy Equipment
- Industrial Automation & Process Control
- Building & Civil Engineering
- Energy Markets
- Machine Tools, Machinery & Robotics
- Other Equipment
- Automotive
- Body Wiring & Power Distribution
- Powertrain
- Comfort, Convenience & Entertainment
- Navigation & Instrumentation
- Safety & Security
- Transportation
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- Commercial Air
- Marine
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- Construction
- Farm & Garden
- Military
- Telecom/Datacom
- Carrier Network
- Enterprise Network
- Mobile & Wireless
- Wireless Infrastructure
- Subscriber Equipment
- Cable-Equipment-Infrastructure
- Other Telecommunications
- Consumer
- Personal/Portable Consumer Electronics
- Home Video Equipment
- Home Audio Equipment
- Consumer White Goods
- Other Consumer
- Other Equipment

**Chapters 4 Thru 8 Provide the Same Detail Level as**

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## To Order *Connector Industry Forecast*



Research Report F-2025-02, **Connector Industry Forecast** 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/>.

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## 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 F-2025-01	Connector Industry Forecast (December 2025) <b>NEW</b>
<input type="checkbox"/> Report M-121-25	2025 Top 100 Connector Manufacturers (August 2025) <b>NEW</b>
<input type="checkbox"/> Report C-122-25	Connector Industry Yearbook (June 2025) <b>NEW</b>
<input type="checkbox"/> Report P-780-25	World RF Coax Connector Market (April 2025) <b>NEW</b>
<input type="checkbox"/> Report M-700-25	World Connector Market Handbook (March 2025) <b>NEW</b>
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<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)
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<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

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](http://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  
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