

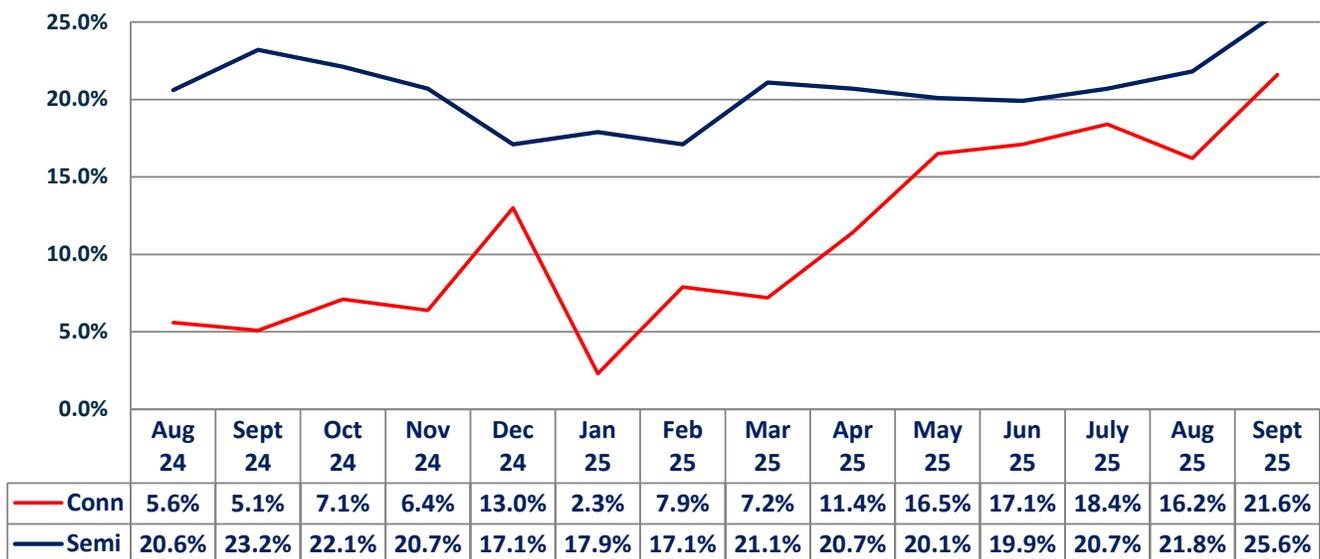
## September Semi Sales Up +25.1% Year-over-Year

The Semiconductor Industry Association (SIA) reported sales of \$69.5 billion during the month of September, up 25.1% over September of 2024. Like in the previous three months, year-over-year, all regions but Japan were up. The Americas increased +30.6%, Asia Pacific/All Other grew +47.9%, China increased +15.0%, and Europe increased +6.0%. Japan, the only region declining, decreased -10.2%. Prior to September, August had been Japan's largest decrease in 2025, now September is. Sequentially sales grew in all regions, with the greatest growth in the Americas where sales grew +8.2%, followed by Asia Pacific/All Other where sales increased +8.0%. Europe increased +5.5%, while China grew +6.0%, and Japan increased +1.6%.

Connector industry sales for September were up +21.6% from the prior year. Regionally for September, YOY sales were up in all regions. The greatest increase was in the Asia Pacific region, where sales increased +45.9%, the fourth month in a row where YOY Asia Pacific billings were up more than +40%. Asia Pacific was followed by China where sales increased +26.1%, North America where sales increased +22.5%, Europe, where sales grew +12.6%, the ROW region, where sales increased +6.6% and Japan where sales grew +2.6% year-over-year. Sequentially sales only grew in two of the six regions. The European region, where sales grew +5.3% and Japan, where sales grew 4.0%. Of the regions experiencing negative sales, the greatest decline was in the ROW region, where sales declined -4.1%, followed by Asia Pacific, where sales declined -3.9%. The two remaining regions, North America and Japan, declined -2.7% and -1.0% respectively.

The following graph compares semiconductor sales performance to the connector industry since August 2024.

Monthly Sales Performance  
Year-Over-Year



The semiconductor industry has now experienced 22 months of strong double-digit growth and has outpaced connectors for 22 months in a row! As we indicate every time the semiconductor industry outpaces connector, this is great news for the connector industry where growth traditionally lags just a few months behind that of semiconductors.

The following table displays year-to-date performance, measured in US dollars, by geographic region for both components.

**Sales Performance  
2025 September YTD**

	Semiconductors	Connectors
<b>North America</b>	<b>35.8%</b>	<b>7.7%</b>
<b>Europe</b>	<b>1.0%</b>	<b>6.2%</b>
<b>Japan</b>	<b>-0.8%</b>	<b>4.3%</b>
<b>China</b>	<b>11.4%</b>	<b>22.0%</b>
<b>Asia Pacific/Other</b>	<b>27.6%</b>	<b>37.3%</b>
<b>World</b>	<b>20.6%</b>	<b>13.2%</b>

Source SIA & Bishop

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Some interesting points to ponder:

- For the third quarter of 2025, semiconductor sales were \$208.4 billion, an increase of 15.8% compared to the second quarter of 2025. Connector sales for the third quarter of 2025 were \$26,701 million, a quarter-over-quarter increase of 11.5%.
- “Global chip sales continued to grow in the third quarter of this year, significantly outpacing sales from Q2,” said John Neuffer, SIA president and CEO. “Market growth was driven by increased demand across a range of semiconductor products, including memory and logic. And year-to-year growth was fueled by sales into the Asia Pacific region and the Americas.”
- The Semiconductor Industry Association (SIA) announced late November that AMD Chair and CEO Dr. Lisa Su has been elected Chair of the SIA Board of Directors. “SIA represents 99% of the U.S. semiconductor industry by revenue and nearly two-thirds of non-U.S. chip firms”.
- Double-digit growth in total semiconductor sales continues to highlight positive connector sales. For 2024, year-to-date connector sales were positive in all 12 months, and positive year-over-year for 10 of the 12 months, declining only in February and March. Currently, for the first nine months of 2025, total year-to-date connector sales and year-over-year connectors sales have been positive in all months.

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