

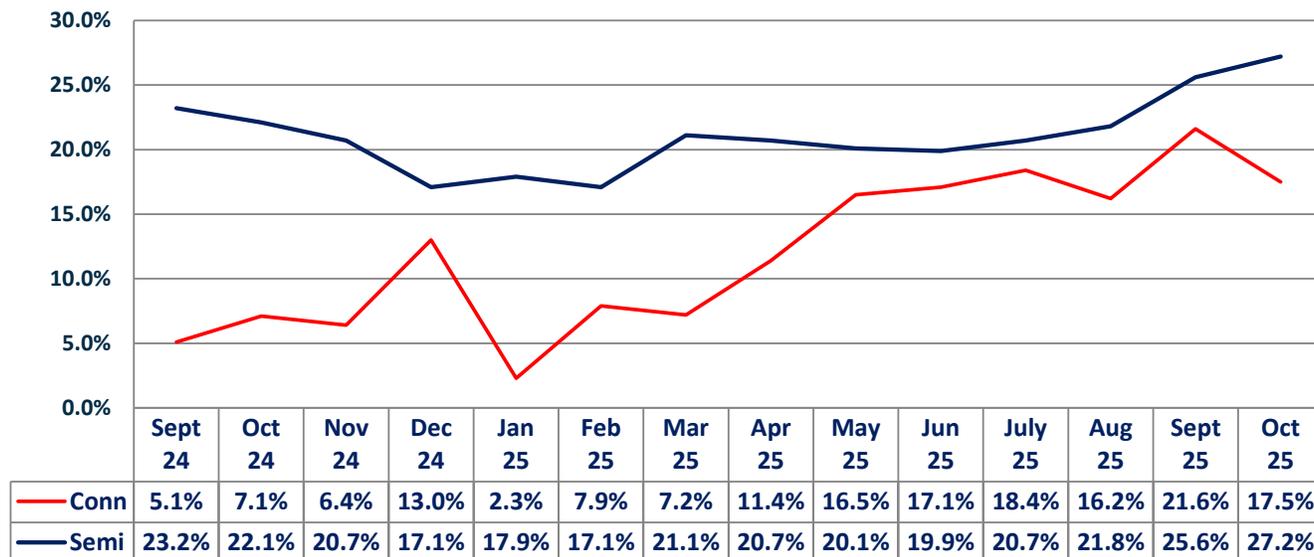
October Semi Sales Up +27.2% Year-over-Year Connector Sales Up +17.5% Year-over-Year

The Semiconductor Industry Association (SIA) reported sales of \$72.7 billion during the month of October, up 27.2% over October of 2024. As in the previous four months, year-over-year, all regions but Japan were up. The Americas increased +24.8%, Asia Pacific/All Other grew +59.6%, China increased +18.5%, and Europe increased +8.3%. Japan, the only region declining, decreased -10.0%. This decline is slightly better than September's decline, when sales were down -10.2%. Sequentially sales grew in all regions, with the greatest growth in the Asia Pacific/All Other region where sales grew +7.2%, followed by China where sales increased +4.4%. North America and Europe were both up +3.5% sequentially, while Japan increased +0.8%.

Connector industry sales for October were up +17.5% from the prior year. Regionally for October, YOY sales were up in four of the six regions. The greatest increase was in the Asia Pacific region, where sales increased +51.6%, the fifth month in a row where YOY, Asia Pacific billings were up more than +40%. Asia Pacific was followed by Europe where sales increased +16.8%, China where sales increased +16.0%, and North America, where sales grew +11.9%. Declining -3.3% and -0.4% respectively were the ROW region and Japan. Like last month, sequentially sales only grew in two of the six regions. The Chinese region, where sales grew +7.7% and the Asia Pacific region, where sales grew 2.3%. Of the regions experiencing negative sales, the greatest decline was in the ROW region, where sales declined -19.7%, followed by Europe, where sales declined -9.3%. The two remaining regions, North America and Japan, declined -8.2% and -0.8% respectively.

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

Monthly Sales Performance
Year-Over-Year



The semiconductor industry has now experienced 23 months of strong double-digit growth and has outpaced connectors for 23 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 October YTD**

	Semiconductors	Connectors
North America	34.4%	8.1%
Europe	1.7%	7.1%
Japan	-1.8%	3.8%
China	12.2%	21.3%
Asia Pacific/Other	31.0%	38.8%
World	21.4%	13.7%

Source SIA & Bishop

© 2025

Some interesting points to ponder:

- With September’s sales of \$69.47 billion, October semiconductor sales of \$72.71 represent a sequential increase of +4.7%.
- “Global semiconductor sales continued to increase in October, topping September’s results and far outpacing October of last year. Growth continues to be driven by sales into the Americas and Asia Pacific,” said John Neuffer, SIA president and CEO.
- Announced in October, “the Semiconductor Industry Association (SIA) endorsed the WSTS autumn 2025 global semiconductor sales forecast, which projects annual global sales will grow by 22.5% to \$772.2 billion in 2025. In 2026, global sales are projected to reach \$975.4 billion, revised up from the spring estimate of \$760.7 billion.”
- 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 10 months of 2025, total year-to-date connector sales and year-over-year connectors sales have been positive in all months.

This news brief is provided as part of your subscription to the Bishop Report. Bishop & Associates, incorporated in 1985, is the leading research firm on the connector industry. The Bishop Report is a monthly newsletter that tracks the performance of the industry. To learn more, or to subscribe, follow this [link](#).