

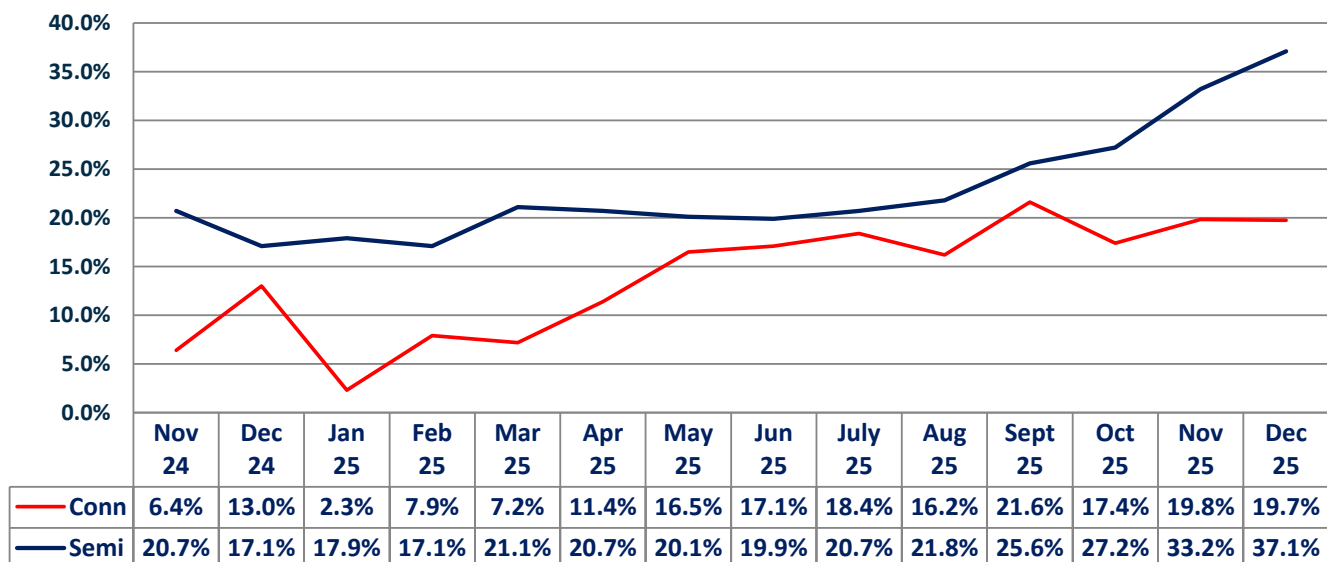
December Semi Sales up +37.1%

The Semiconductor Industry Association (SIA) reported December sales of \$78.9 billion, up +37.1% over December of 2024. Year-over-year, the Americas increased +27.1%, China increased +34.2%, Asia Pacific/All Other increased +76.3%, and Europe grew +17.1%, while Japan declined -8.2%. Sequentially sales increased by +2.7% from November 2025 sales of \$76.8 billion.

Connector industry sales in December were up +19.7% from the prior year. Regionally for December, YOY sales increased, +19.5% in North America, +18.1% in Europe, +4.7% in Japan, +17.9% in China, and +40.1% in Asia Pacific. YOY sales decreased -4.3% in ROW.

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

Monthly Sales Performance
Year-Over-Year



The semiconductor industry has now experienced 14 months of strong double-digit growth and has outpaced connectors for 14 months in a row! This is great news for the connector industry whose growth traditionally lags just a few months behind that of semiconductors.

From a yearly perspective, according to the Semiconductor Organization, “the global semiconductor industry posted its highest-ever annual sales in 2025, nearly hitting \$800 billion, and global sales in 2026 are projected to reach roughly \$1 trillion,” said John Neuffer, SIA president and CEO. “Semiconductors are the foundation of nearly all modern technology, and emerging technologies like AI, IoT, 6G, autonomous driving, and others will continue to drive robust demand for chips.”

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

Sales Performance 2025 December YTD

| | Semiconductors | Connectors |
|--------------------|----------------|------------|
| North America | 32.9% | 9.3% |
| Europe | 3.9% | 8.9% |
| Japan | -3.0% | 3.2% |
| China | 15.4% | 21.1% |
| Asia Pacific/Other | 38.4% | 39.4% |
| World | 23.9% | 14.7% |

Source SIA & Bishop

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Some interesting trends include:

- According to Neuffer, “As semiconductors continue to propel the game-changing technologies of today and tomorrow, it’s critical for leaders in Washington to prioritize policies that will strengthen the domestic chip ecosystem for years to come. A globally competitive U.S. semiconductor industry will allow us to boost our economy, enhance national security, and lead the global race for technological leadership in the 21st century”.
- Double-digit growth in semiconductor sales highlights positive connector sales year-to-date and year-over-year. Year-to-date and year-over-year connector sales were positive in all 12 months of 2025, with double digit year-over-year growth in nine of 12 months, and year-to-date growth was double-digit in seven of the last 12 months.
- As commented by the SIA, “Several semiconductor product segments stood out in 2025. Sales of logic products increased by 39.9%, totaling \$301.9 billion in 2025, making it the largest product category by sales. Memory products were second in terms of sales, increasing by 34.8% in 2024 to a total of \$223.1 billion”.
- Although not as strong as the roughly \$1 trillion growth forecasted by the semiconductor industry for 2026, connector sales in 2026 are also forecast to show good growth. Bishop is presently forecasting connector sales to grow +11.5% in 2026, with the strongest growth in Asia Pacific at +24.0% followed by China with growth of +11.7%. All other regions are expected to show single-digit growth

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