

## Strong Growth Continues in February With Double-Digit Growth in 11 of the Last 12 Months

February bookings increased by +32.6%, while billings increased by +15.0%.

### Regional Performance:

Year-to-date, sales for February are positive in all regions. The greatest growth, as was seen in December and January is in the Asia Pacific region, where sales grew +39.7%, followed by China where sales increased +17.3%. Although still positive, the weakest growth was once again seen in the Japanese region where sales grew +4.0%. From a booking perspective, all regions showed positive year-over-year double-digit growth, with the greatest growth in North America at +45.0%, followed by China, at +40.8%. The least growth occurred in the European region, where sales grew +14.8%. See page 5.

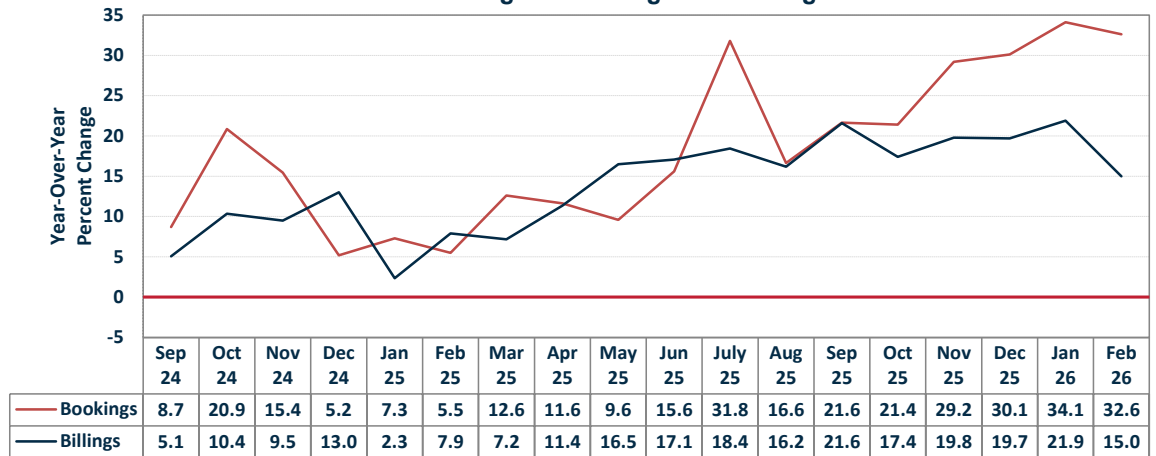
### 2026 Currency Impact:

The industry registered a YOY increase in sales in February 2026, of +15.0 in USD and +5.0% in local currency.

**NEW BISHOP  
RESEARCH REPORT**

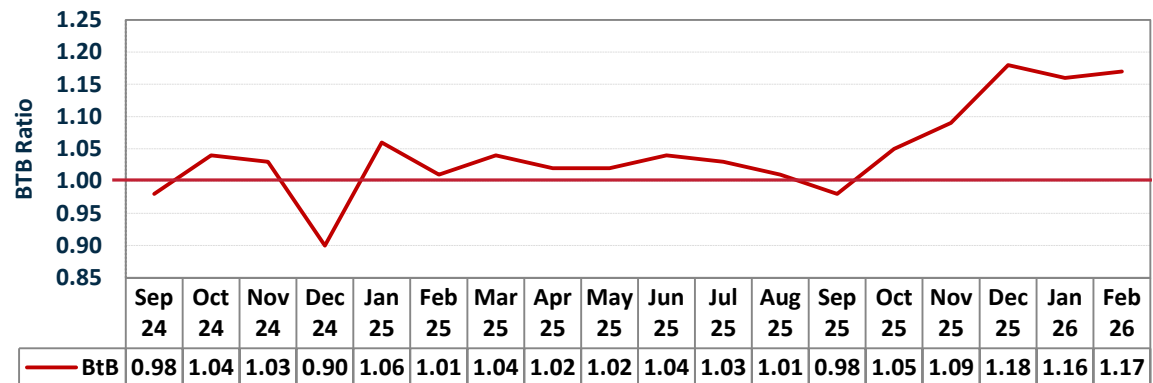
**Connector Market  
Handbook  
Research Report**

Bookings and Billings YOY Change



The book-to-bill ratio in February was 1.17, up from 1.16 in January. This is the 15<sup>th</sup> time in the last 18 months that the book-to-bill was over 1.00.

Connector Industry Book-to-Bill

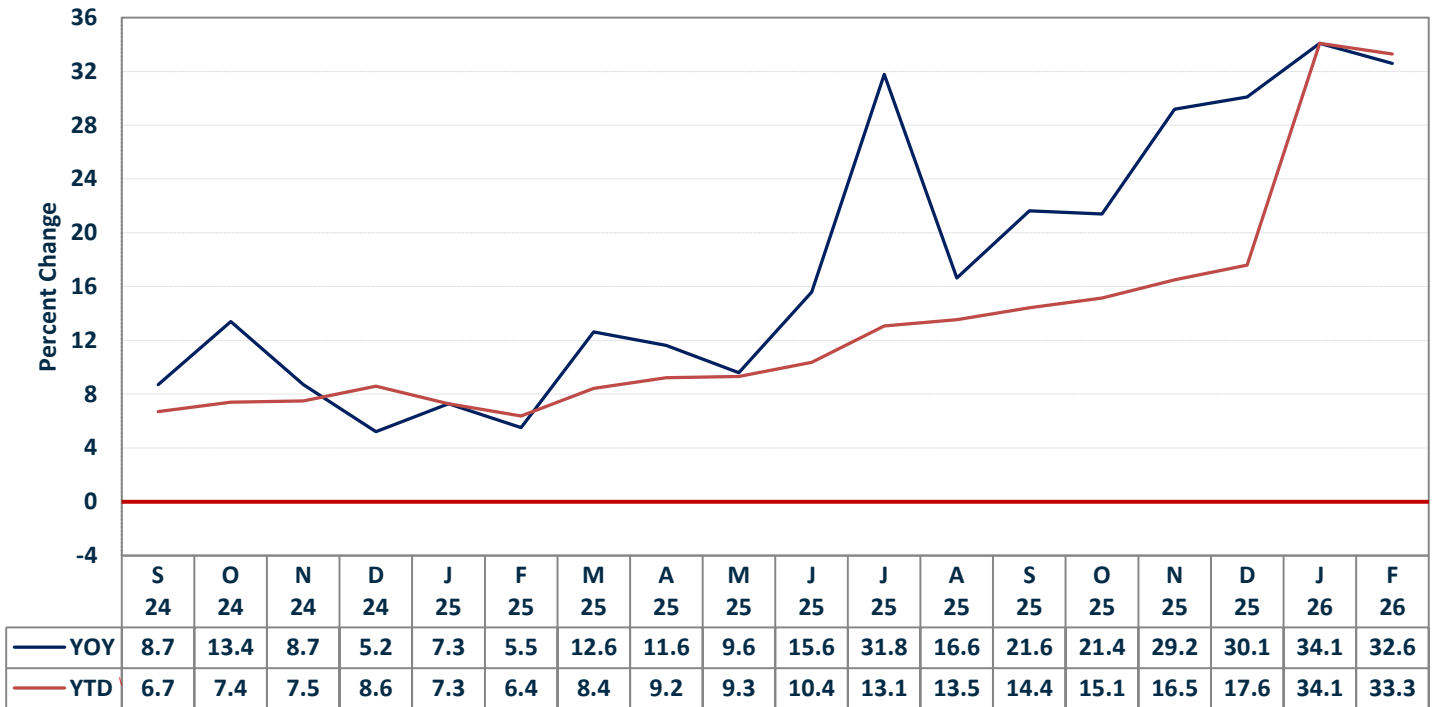


## Booking Highlights and Conclusions

### Sequential, Year-Over-Year, and Year-To-Date Bookings Percentage Change – 2024/2025/2026

Month	Sequential			Year-Over-Year			Year-To-Date		
	2024	2025	2026	2024	2025	2026	2024	2025	2026
Jan	9.1%	2.2%	5.3%	8.3%	7.3%	34.1%	8.3%	7.3%	34.1%
Feb	5.2%	5.6%	4.5%	6.8%	5.5%	32.6%	7.5%	6.4%	33.3%
Mar	-2.9%	2.2%		-1.4%	12.6%		4.4%	8.4%	
Apr	3.2%	-0.8%		10.2%	11.6%		5.8%	9.2%	
May	9.1%	11.9%		5.8%	9.6%		5.8%	9.3%	
Jun	-6.8%	-5.2%		11.3%	15.6%		6.7%	10.4%	
Jul	-5.8%	0.1%		4.4%	32.0%		6.4%	13.1%	
Aug	11.6%	5.3%		7.3%	16.6%		6.5%	13.5%	
Sep	-5.0%	-3.5%		8.7%	21.6%		6.8%	14.4%	
Oct	9.6%	3.8%		20.9%	21.4%		8.1%	15.1%	
Nov	4.9%	15.1%		15.4%	29.2%		8.8%	16.5%	
Dec	-21.6%	-7.8%		5.2%	30.1%		8.6%	17.6%	

### Bookings - YOY and YTD



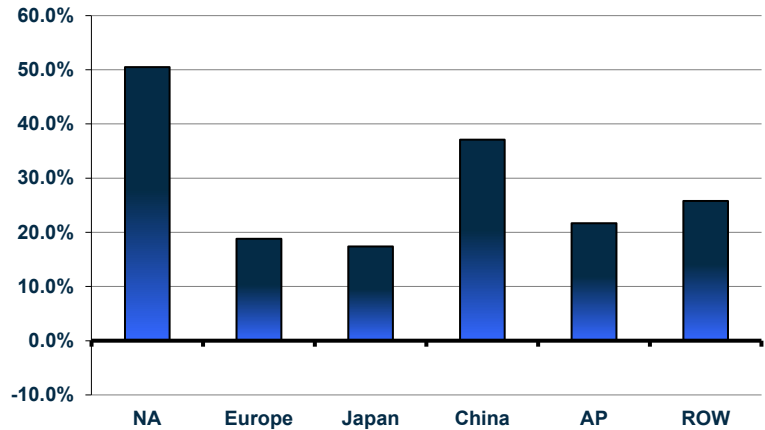
- February bookings increased +32.6% year-over-year.
- Orders increased +4.5% on a sequential basis in February.
- The book-to-bill ratio for February was 1.17, up from 1.16 in January.

## Regional Performance: BOOKINGS

### January 2026 Bookings

Region	Sequential	YOY	YTD
NA	-6.6%	45.0%	50.5%
Europe	21.6%	14.8%	18.8%
Japan	36.8%	22.9%	17.4%
China	-17.4%	40.8%	37.1%
AP	56.4%	36.0%	21.7%
ROW	15.3%	29.4%	25.8%
<b>Total</b>	<b>4.5%</b>	<b>32.6%</b>	<b>33.3%</b>

Year-To-Date Bookings by Region



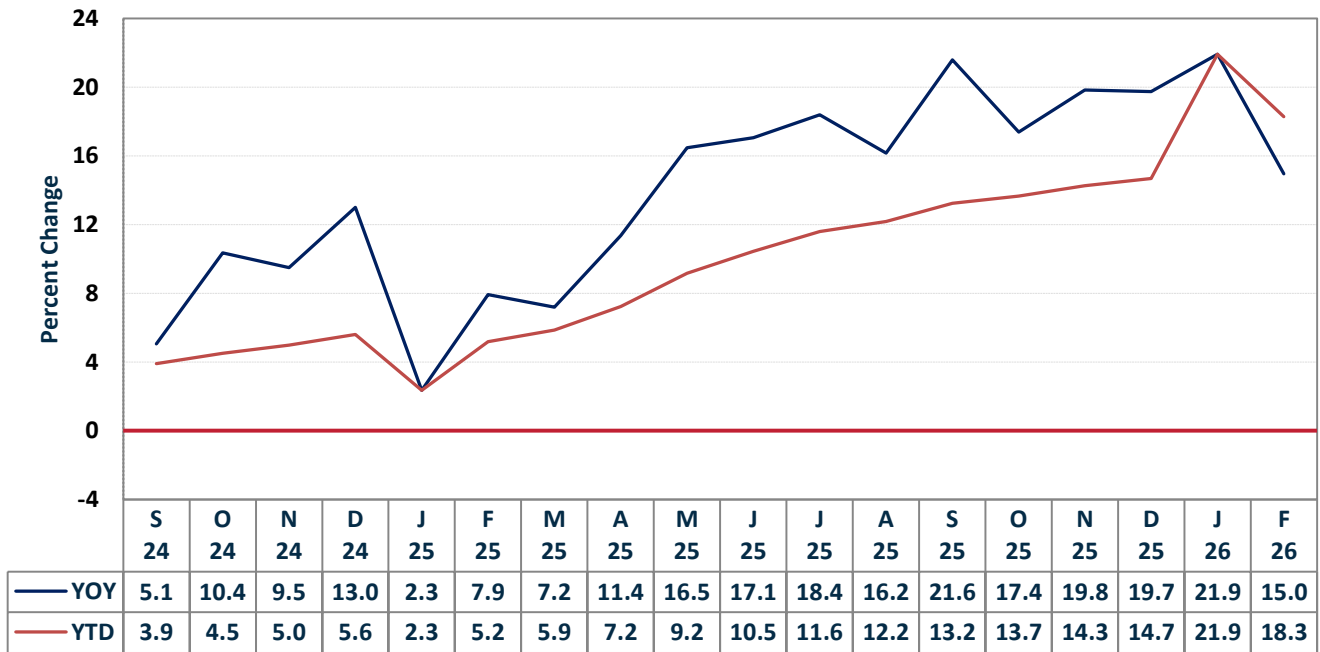
- Year-to-date, January bookings increased +34.1%, with the greatest growth in the North American region, where bookings increased +56.1%, followed by China with growth of +34.3% and the ROW region where bookings increased +21.8%. The lowest growth was seen in the Asia Pacific region, where bookings increased only +4.5%. This is in total contrast to December, when Asia Pacific had year-over-year growth of +158.7% and year-to-date growth of +52.9%. Sequentially four of the six regions saw an increase, with North America seeing the greatest increase at +37.4%, followed by the ROW region with an increase of +23.7%. The two regions showing a sequential decline, Japan and the Asia Pacific region, declined -14.5% and -38.1% respectively.
- Year-over-year total world order growth has now been positive for 22 consecutive months.

## Billing Highlights and Conclusions

### Sequential, Year-Over-Year, and Year-To-Date Billings Percentage Change – 2024/2025/2026

Month	Sequential			Year-Over-Year			Year-To-Date		
	2024	2025	2026	2024	2025	2026	2024	2025	2026
Jan	5.8%	5.5%	7.4%	3.5%	2.3%	21.9%	3.5%	2.3%	21.9%
Feb	2.8%	9.9%	3.6%	-1.0%	7.9%	15.0%	1.2%	5.2%	18.3%
Mar	0.4%	-0.1%		-1.1%	7.2%		0.4%	5.9%	
Apr	1.7%	1.1%		10.1%	11.4%		2.7%	7.2%	
May	4.3%	11.6%		2.8%	16.5%		2.7%	9.2%	
Jun	-4.9%	-6.9%		3.3%	17.1%		2.8%	10.5%	
Jul	1.8%	0.9%		7.1%	18.4%		3.4%	11.6%	
Aug	5.8%	7.4%		5.6%	16.2%		3.7%	12.2%	
Sep	-3.0%	-0.2%		5.1%	21.6%		3.9%	13.2%	
Oct	3.2%	-3.3%		10.4%	17.4%		4.5%	13.7%	
Nov	5.1%	10.4%		9.5%	19.8%		5.0%	14.3%	
Dec	-9.5%	-14.9%		13.0%	19.7%		5.6%	14.7%	

**Billings - YOY and YTD**

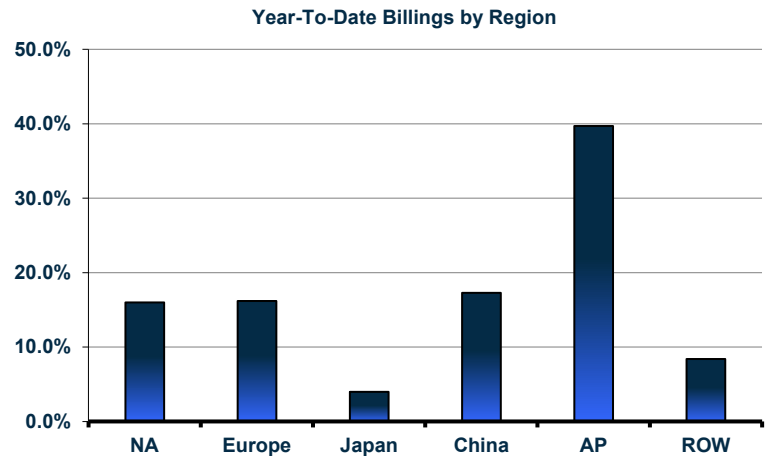


- February billings grew +15.0% year-over year and +18.3% year-to-date.
- Sequentially, February billings increased +3.6%.
- Year-over-year sales growth has now been positive for 23 consecutive months and year-to-date for 26 consecutive months.

## Regional Performance: BILLINGS

### February 2026 Billings

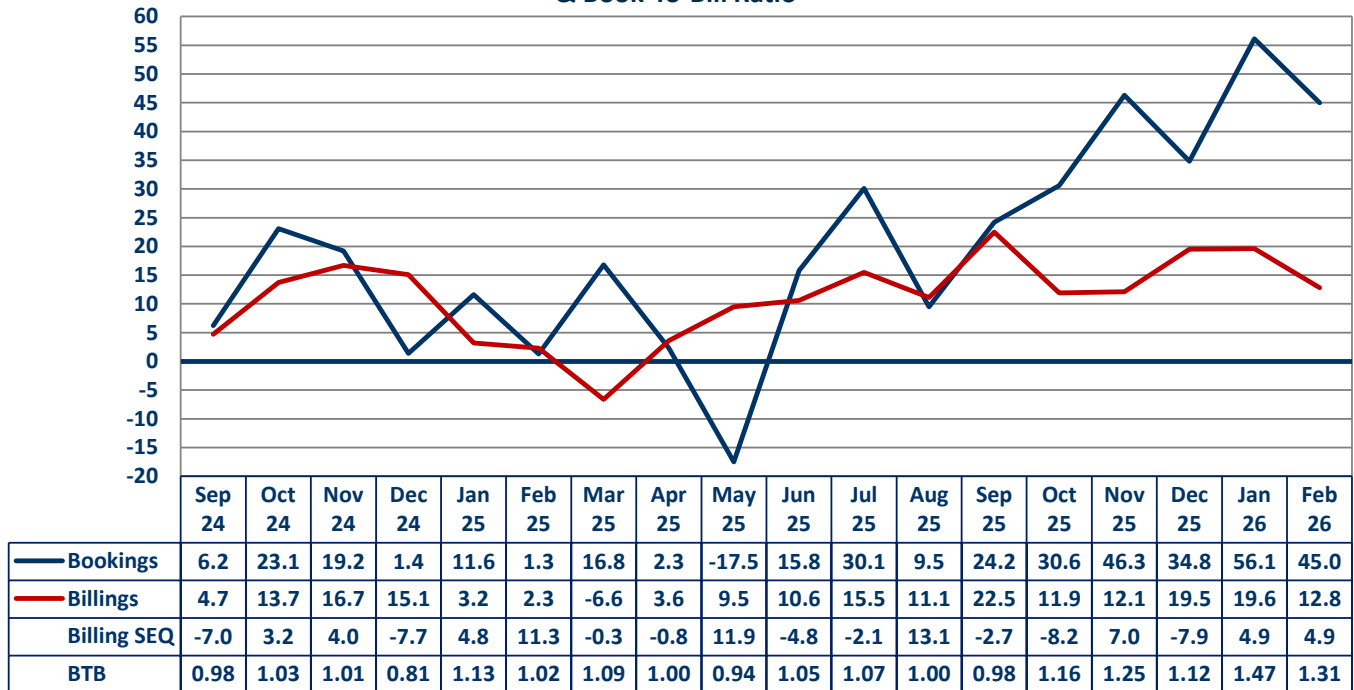
Region	Sequential	YOY	YTD
NA	4.9%	12.8%	16.0%
Europe	21.8%	16.7%	16.2%
Japan	18.6%	5.9%	4.0%
China	-11.9%	10.7%	17.3%
AP	-9.5%	30.7%	39.7%
ROW	41.3%	11.3%	8.4%
<b>Total</b>	<b>3.6%</b>	<b>15.0%</b>	<b>18.3%</b>



- February connector sales increased by +15.0% compared to the same period last year, and +18.3% year-to-date.
- Sequentially, all but two region showed an increase. The greatest increase was in the ROW region, at +41.3%, followed by the European region, where sequential sales increased +21.8%. The two regions showing a decrease sequentially were China and the Asia Pacific regions, where sales decreased -11.9% and -9.5% respectively.
- Year-over-year, all six regions saw an increase, with the greatest increase in the Asia Pacific region where sales increased +30.7%, followed by the European region, where sales increased +16.7%.

**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.

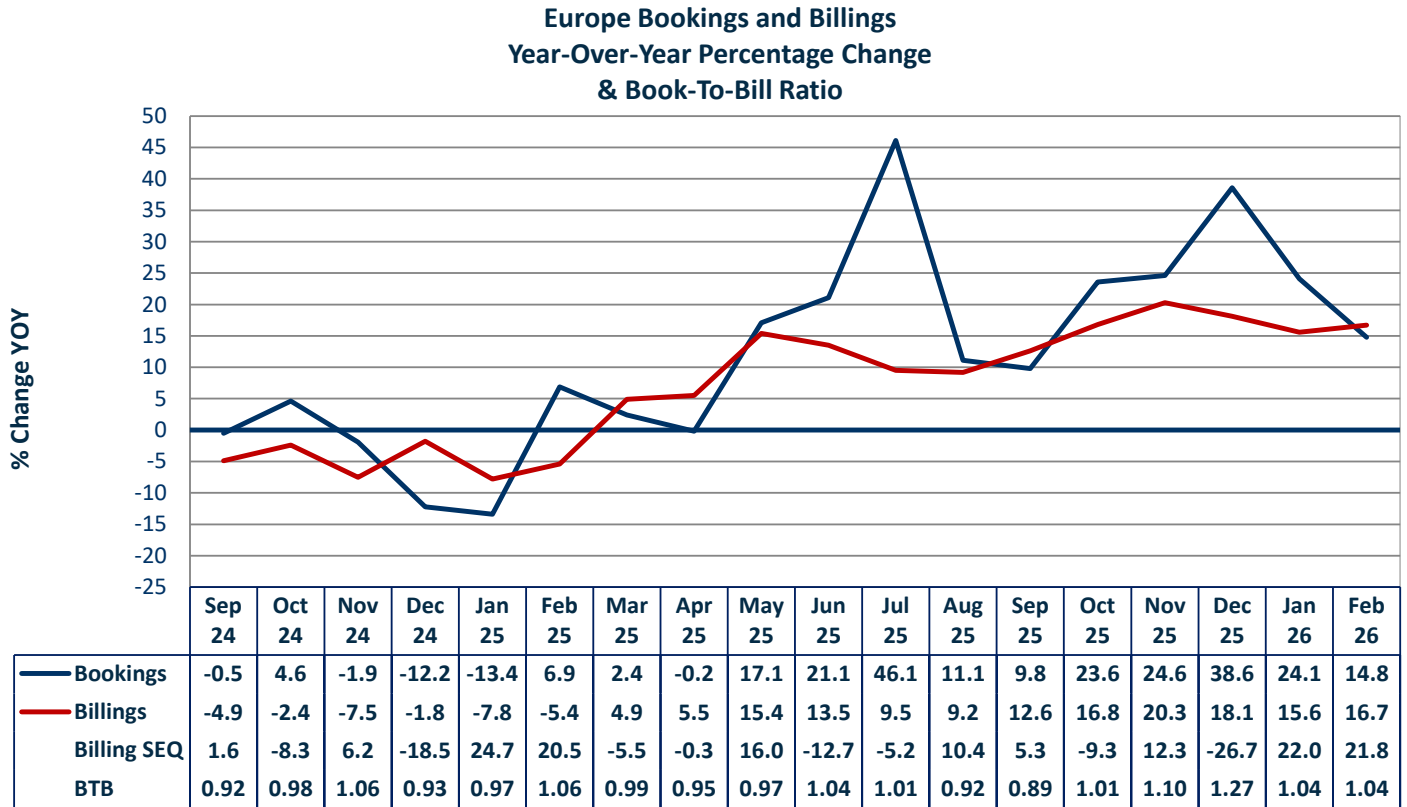
**North America Bookings and Billings  
Year-Over-Year Percentage Change  
& Book-To-Bill Ratio**



## North America Performance

- Sales increased +12.8% year-over-year in February, while orders increased +45.0%, down from +56.1% in January. Sequentially, North American billings remained flat, increasing +4.9%, same as last month. The book-to-bill ratio decreased to 1.31, down from 1.47 in January.
- The US unemployment rate edged up to 4.4% in February 2026, slightly above market expectations. The number of unemployed increased by 203,000 to 7.57 million, while total employment fell by 185,000 to 162.91 million, according to Trading Economics.
- The Consumer Price Index for All Urban Consumers (CPI-U) increased 0.3% on a seasonally adjusted basis in February, after rising 0.2% in January, the U.S. Bureau of Labor Statistics reported. Over the last 12 months, the all items index increased 2.4% before seasonal adjustment.
- The number of new vehicles sold in the U.S. in February, aggregated by MarkLines as of March 4, was 1,199,308 units, down 1.9% from the same month last year. This is the fifth consecutive month of decline, as rising vehicle prices and expired incentives weighed on demand, according to MarkLines.
- The University of Michigan's consumer sentiment index fell to 55.5 in March, down from 56.6 in February slightly above market expectation of 55, according to preliminary data. This marked the lowest level in three months, as households reacted to the military conflict involving the US and Iran, according to Trading Economics.

**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.



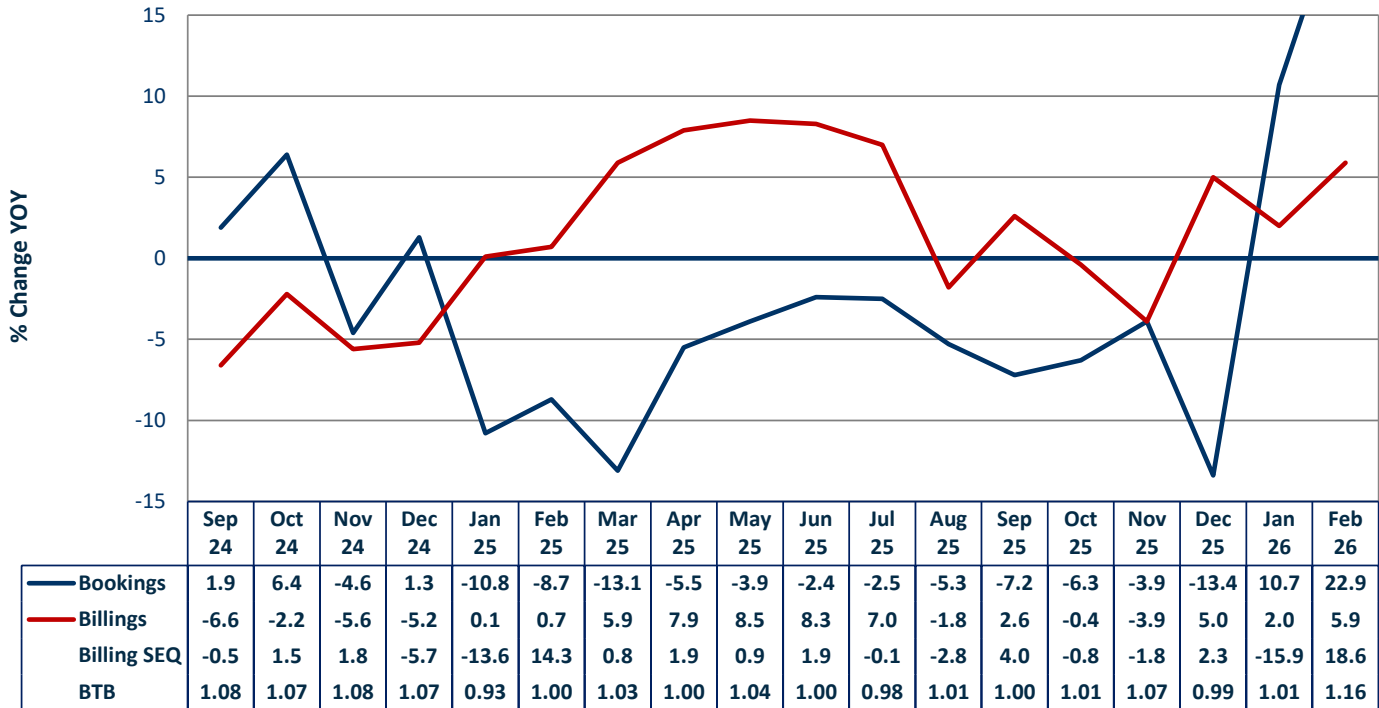
## Europe Performance

- Bookings increased +14.8% in February. This is the fifth month in a row, with double-digit bookings. Billings increased by +16.7%, up from +15.6% in January. Sequentially, sales increased by +21.8, the third time in the last four months when sequential billings showed double-digit growth. The book-to-bill ratio was 1.04, same as in January.
- “In January\* 2026, EU passenger car registrations fell by 3.9% compared to January last year, marking a second consecutive challenging start to the year for the market”, according to the European Automobile Manufacturers’ Association (ACEA). “The battery-electric car market share reached 19.3%, highlighting the continued potential for further growth.”
- “Unemployment Rate in the Euro Area decreased to 6.10% in Jan.\* from 6.20% in December of 2025. Unemployment Rate in Euro Area averaged 9.17% from 1995 until 2026, reaching an all-time high of 12.30% in Jan. of 2013 and a record low of 6.10% in Jan. of 2026, according to Eurostat.
- "In February 2026, the Eurozone Economic Sentiment Indicator (ESI) fell to 98.3, down from a three-year high of 99.3 in January and below market expectation of 99.8. Sentiment weakened among service providers, manufacturers, and construction firms. according to the European Commission.

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

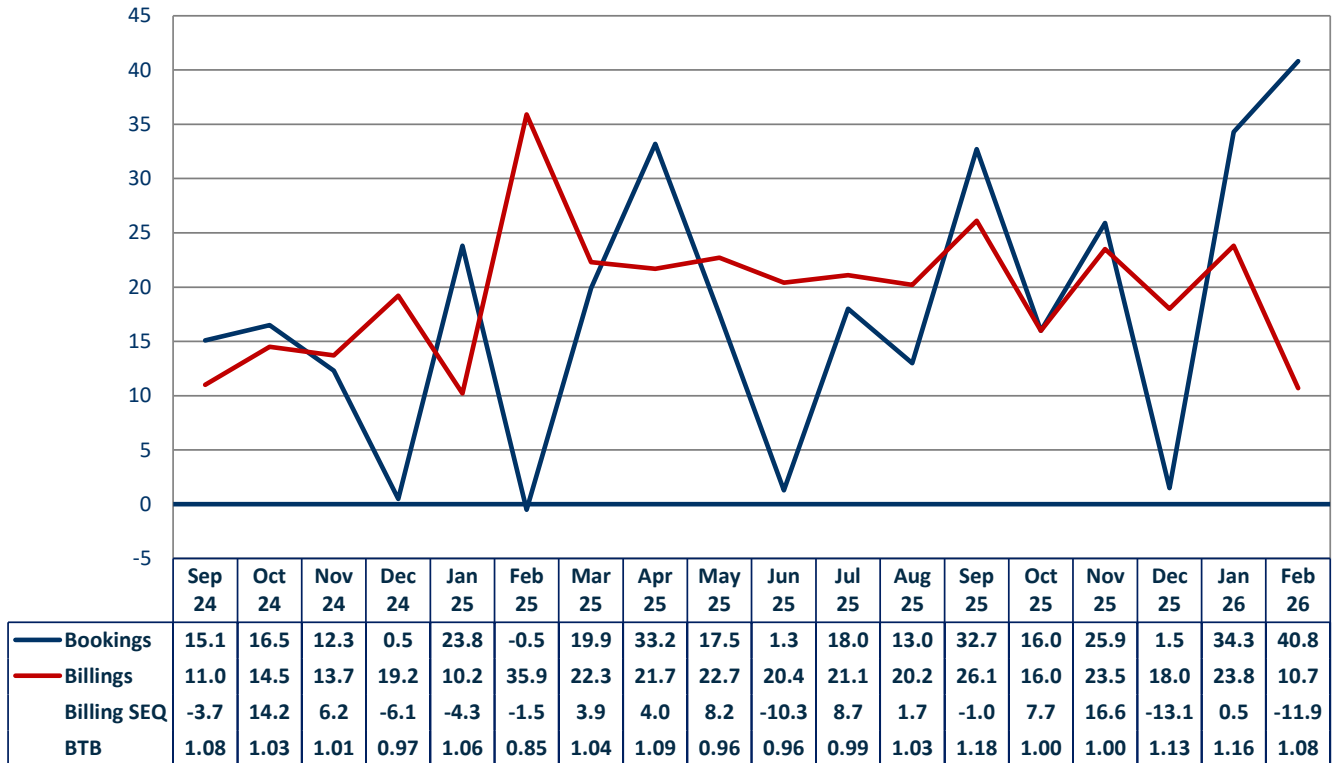


## Japan Performance

- Japan’s February year-over-year bookings increased +22.9, up from +10.7% in January, while billings increased +5.9%, up from +2.0% in January. Sequentially, sales increased +18.6%, up from -15.9% in January. Japan’s book-to-bill ratio increased to 1.16, from 1.01 in January.
- “Core consumer prices in Tokyo’s central wards increased 1.8% YoY in Feb. 2026, easing from a 2% rise in Jan. and marking the softest pace since Oct. 2024. Inflation in Japan’s capital slowed for a third straight month, though it slightly exceeded market expectations of 1.7% according to Trading Economics.
- “Japan’s S&P Global Composite PMI rose to 53.9 in February 2026, slightly higher than the preliminary estimates of 53.8, and picking up from 53.1 in January, marking the fastest expansion in overall private sector activity since May 2023”, according to Trading Economics.
- “Japan’s unemployment was at 2.7% in Jan.\* 2026, edging higher from figures in the prior five months and market forecasts of 2.6% and, marking the highest level since July 2024.”, according to Trading Economics. Japan’s new vehicle market in “Feb 2026 remained sluggish, with sales dropping 3.5% to 394,965 units, according to JAMA data via MarkLines”. *\*February readings not published at the time of this reporting.*
- Japan’s exports climbed 4.2% from a year earlier in February, marking a sharp slowdown after hitting an over-three-year high in January. Exports to mainland China, Japan’s largest trading partner, fell 10.9%, while shipments to the U.S. dropped 8%. The total value of auto exports to the U.S., Japan’s biggest export item, fell 14.8%”, according to CNBC.

**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

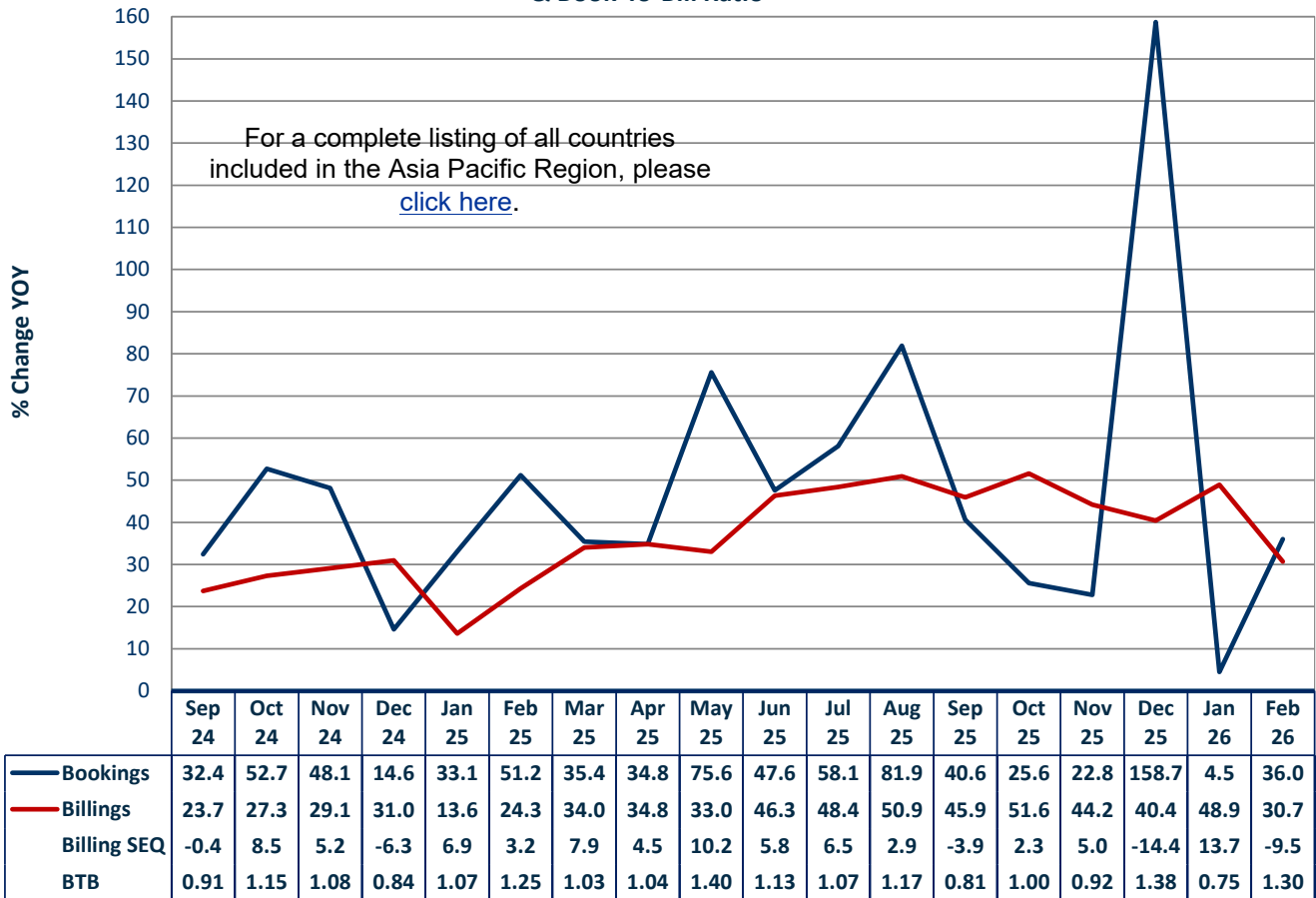


## China Performance

- China's Feb. sales grew +10.7% on a year-over-year basis. Bookings increased by +40.8% in Feb., while sequentially, sales decreased by -11.9%. The book-to-bill decreased to 1.08, down from 1.16 in Feb.
- In February 2026, China's "consumer price index (CPI) increased by 1.3% year on year and 1.0% month on month," according to National Bureau of Statistics of China.
- "China's auto industry recorded a noticeable slowdown in February mainly due to the holiday season, with vehicle production totaling 1.672 million units and sales reaching 1.805 million units", according to data by the China Association of Automobile Manufacturers ("CAAM").
- China's General Composite PMI rose to 55.4 in February 2026 from 51.6 in the previous month, marking the fastest expansion in overall private-sector activity since May 2023", according to Trading Economics. "While shipments to the U.S. fell 11% in January and February, narrowing from a 30% drop in December, exports to the European Union increased almost 28% while those to Latin America climbed 16%", according to APNews.
- "China's surveyed urban unemployment rate rose to 5.3% in February 2026 from 5.2% in the previous month and above market expectations of 5.1%", 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**

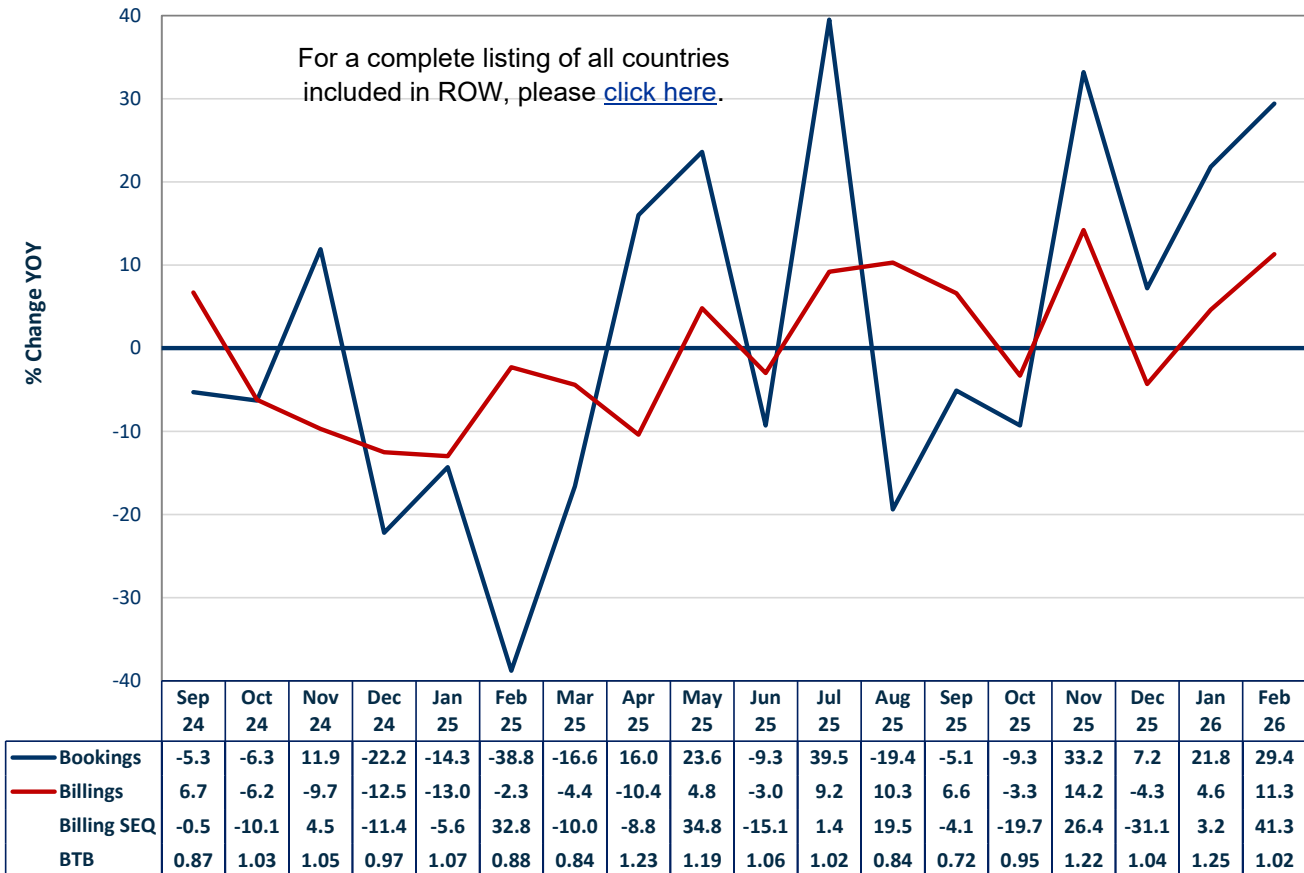


## Asia Pacific Performance

- Year over year, February orders were up +36.0%, a strong increase over January's +4.5% growth. Billings increased by +30.7%, down from +48.9% in January. Sequentially, sales decreased by -9.5%. The book-to-bill ratio climbed to 1.30 in February after declining to 0.75 in January.
- “India's wholesale prices rose 2.13% year-on-year in February, accelerating from a 1.81% increase in January and exceeding expectations of a 2% gain”. This marked the fastest rise since February last year, driven by a pickup in inflation for primary articles”, according to The Economic Times.
- “The HSBC India Manufacturing PMI fell to 53.8 in March 2026 from 56.9 in February, exceeding expectations for a slight easing to 56.8, preliminary estimates showed. This marks the weakest expansion in factory activity since September 2021, according to Trading Economist.
- South Korea's exports jumped nearly 30% YoY in February to mark the highest level ever recorded for the month, driven by growing demand for semiconductors amid the artificial intelligence (AI) boom, according to the data compiled by the Ministry of Trade, Industry and Resources.

**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 increased by +29.4% in February, the third time in the last four months when bookings were in double-digits. Billings increased by +11.3% year-over-year, up from +4.6% in January. Sequentially, sales increased by +41.3%, up from last month's +3.2%. The book-to-bill ratio was 1.02.
- Brazil's "consumer prices increased by 0.7% in February, following a 0.33% rise in the previous month. Annual inflation declined to 3.81% in February from 4.44% in the previous month, thus finally returning to the target range", according to Economy.com.
- The S&P Global Brazil Manufacturing PMI "edged up to 47.3 in February 2026 from 47.0 in January, still signaling solid sector deterioration and marking the 10<sup>th</sup> straight month below 50", according to Trading Economics.
- "South Africa's seasonally adjusted Absa Purchasing Managers' Index (PMI) rose to 48.7 in January 2026 from 40.5 in December, which was the weakest reading since April 2020. The improvement was primarily driven by a rebound in business activity, with the relevant sub-index rising above 50 to 51.4 from 46.1 in December", according to Trading Economics.

## 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
<b>GDP Growth YOY</b>	2.2% Steady	1.2% Steady	1.0% Steady	4.8% Up Steady	N/A	N/A
<b>Industrial Production Growth</b>	0.2% Down	1.5% Down	4.3% Up	6.3% Up	N/A	N/A
<b>Manufacturing PMI*</b>	52.4 Steady	50.8 Up	53.0 Up	49.0 Down	N/A	N/A
<b>Inflation Rate</b>	2.4% Steady	1.9% Up	1.3% Down	1.3% Up	N/A	N/A
<b>Unemployment Rate</b>	4.4% Steady	5.8% Down	2.7% Up	5.3% Up	N/A	N/A
<b>Retail Sales Growth YOY</b>	6.0% Up	2.0% Steady	1.8% Up	2.8% Up	N/A	N/A
<b>Feb. Connector Sales</b>	12.8%	16.7%	5.9%	10.7%	30.7%	11.3%
<b>YTD Connector Sales</b>	16.0%	16.2%	4.0%	17.3%	39.7%	8.4%
<b>Feb. Connector Orders</b>	45.0%	14.8%	22.9%	40.8%	36.0%	29.4%
<b>YTD Connector Orders</b>	50.5%	18.8%	17.4%	37.1%	21.7%	25.8%

\* Purchasing Manager Index - Below 50 is contracting factory activity

### Key Take Aways:

- For the first time since November 2025, retail sales growth is up in all regions, with the greatest increase in North America. GDP growth in all four main regions also shows steady growth year-over-year.
- With the exception of China, the PMI in all key regions, North America, Europe, and Japan were up over 50, with the highest in Japan at 53.0. Inflation, although up in Europe and China, was still surprisingly low, ranging between 2.4 and 1.3.
- In February, bookings were up in all regions in the double-digit range, with the greatest growth year-over-year and year-to-date in North America, followed by China.

## The Industry Backlog Is 11.7 Weeks

February 2026 was another great month for the connector industry. Orders totaled \$10,506 million, up +32.6% over the same period in 2025. Sales were \$9,118 million, up +15.0%.

The industry shipped \$2,280 million per week in February. Assuming the same weekly shipments, the industry has 11.7 weeks of backlog (ending backlog \$26,744 million divided by \$2,280 million).

### Industry Backlog

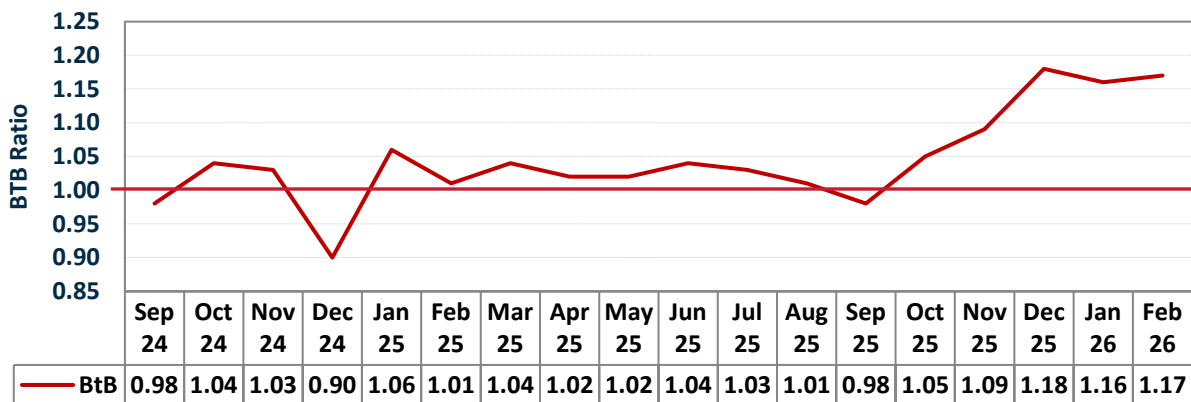
	Full Year 2025	Feb 2026
BtB Ratio	1.00	1.17
Beginning Backlog	\$21,287	\$24,067
YTD Bookings	\$101,868	\$20,309
YTD Billings	\$99,088	\$17,632
Ending Backlog	\$24,067	\$26,744
Backlog in Weeks	12.6	11.7

\$ Millions

Connector demand continues to be very strong year-over-year. This marks nine months in a row when orders achieved double-digit growth.

The following chart displays the book-to-bill ratio (BtB) for the last 18 months. You will note that during that time frame, the book-to-bill ratio has been over 1.00 15 out of the 18 months, or 83.3% of the time.

### Connector Industry Book-to-Bill



## 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 January 2025 versus January 2026 and shows results for these three currencies.

### Local Currency to One USD 2025 YTD versus 2026 YTD

Currency	2025	2026	% Change
Euro	0.9604	0.8455	13.6%
Yuan	7.2691	6.9136	5.1%
Yen	151.8554	155.0379	-2.1%

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 February YOY performance by region in US dollars and local currencies.

### Industry Sales Performance February 2026 USD-vs-Local Currencies

Region	U.S.\$	Local Currency
North America	12.8%	12.8%
Europe	16.7%	13.6%
Japan	5.9%	-2.1%
China	10.7%	5.1%
Asia Pacific	30.7%	30.7%
ROW	11.3%	11.3%
<b>World</b>	<b>15.0%</b>	<b>5.0%</b>

Connector sales in February of 2026 increased +5.0% when measured in local currencies, versus an increase of +15.0% in US dollars.

## Connector Sales & Order Trends

Connector orders have exhibited a double-digit increase for nine consecutive months. Sales have shown a double-digit increase for the last 11 consecutive months. We are in a historical period of time for connector demand.

**2025 Orders and Sales  
Growth in 2025 by Month  
Percentage Change**

Month	Orders	Sales
January	7.3%	2.3%
February	5.5%	7.9%
March	12.6%	7.2%
April	11.6%	11.4%
May	9.6%	16.5%
June	15.6%	17.1%
July	32.0%	18.4%
August	16.6%	16.2%
September	21.6%	21.6%
October	21.4%	17.4%
November	29.2%	19.8%
December	30.1%	19.7%
<b>Year-to-Date</b>	<b>17.6%</b>	<b>14.7%</b>

**2026 Orders and Sales  
Growth in 2026 by Month  
Percentage Change**

Month	Orders	Sales
January	34.1%	21.9%
February	32.6%	15.0%
March		
April		
May		
June		
July		
August		
September		
October		
November		
December		
<b>Year-to-Date</b>	<b>33.3%</b>	<b>18.3%</b>

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

Connector demand is strong. We have recorded 23 consecutive months of growth in both orders and sales, allowing us to continue to believe 2026 will be a good year for the connector industry!

## Significant Events

### February 2026 News

#### **Electronics Manufacturing: Demand Holds Firm, but Cost Pressures Intensify**

The latest findings from The Current Sentiment of the Global Electronics Manufacturing Supply Chain show demand across the electronics manufacturing sector remained elevated in March following February's sharp surge, signaling continued resilience in industry activity. Simultaneously, manufacturers are facing renewed cost pressures and tightening component availability, particularly in memory markets, creating a more complex operating environment.

#### **IDC Cuts 2026 PC Outlook to -11.3% as Memory Shortages and Supply Chain Disruptions Persist Into 2027**

Amid ongoing memory and supply chain disruptions, IDC has made significant downward revisions to its PC and tablet outlook. According to the latest data from the International Data Corporation (IDC) Worldwide Quarterly Personal Computing Device Tracker, global PC shipments are now expected to decline 11.3% in 2026 — a substantial reduction from the -2.4% outlook published in November 2025. Tablet shipments are similarly forecast to fall 7.6% this year.

These reductions are driven by a convergence of memory shortages, rising component prices, and broader supply constraints, all of which are expected to limit production well into 2027, making recovery timing a challenging and shifting target. It is also worth noting that at the time this forecast was published, the conflict in the Middle East had not yet escalated to its current level, adding yet another significant challenge for many industries, including technology and hardware.

Even in the shadow of these shortages, the market retains pockets of resilience. Higher average selling prices (ASPs) are expected to lift total market value, with PCs growing 1.6% to \$274 billion and tablets expanding 3.9% to \$66.8 billion in 2026.

#### **Worldwide Server Market Finished 2025 With an All-time Record of 444 billion dollars Revenue**

The server market reached a record \$125.3 billion dollars in revenue during the fourth quarter of 2025, fueled by the accelerated AI Infrastructure investment path that keep outpacing any geopolitical tensions, according to the International Data Corporation's (IDC) Worldwide Quarterly Server Tracker.

The global server market has maintained its resiliency throughout economic challenges. Leading companies continue investing in infrastructure especially in top hyperscalers while large Service providers race to lead in the AI era.

- This quarter showed another high double digit-growth rate by reaching a year-over-year (YoY) increase of 52.4% in vendor revenue compared to the same quarter of 2024.
- Revenue generated from x86 servers increased 16.9% in 2025Q4 to \$69.8 billion while Non-x86 servers increased 146.4% YoY to \$55.5 billion.
- Revenue for servers with an embedded GPU in the fourth quarter of 2025 grew 59.1% year-over-year representing more than half of the total server market revenue.
- For calendar year 2025 the market finished growing 80.4% compared to 2024, reaching a yearly record of \$444.1 billion dollars revenue.

- Hyperscalers and cloud service providers keep leading investment demand while traditional on-premise segment remain cautious on their spending path.
- Even though recession fears remain low, the global economy, slow growth, and geopolitical tensions represent the main worry for the future

The United States is the fastest growing region in the server market with an increase of 72.4% compared to the fourth quarter of 2024, fueled by 80.1% growth in the accelerated server segment. Canada grew 70.7% pushed by the same reason. EMEA and APeJC also showed double digit growth with 43.6%, and 27.9% respectively. PRC and Latin America showed smoother but healthy growth of 17.7% and 12.8% each while Japan declined by 4.7% as couldn't match an important investment a year ago.

**Top 5 Companies, Worldwide Server Market, Fourth Quarter of 2025 (Vendor Revenue in US\$ millions)**

Company	4Q25 Vendor Revenue	4Q25 Market Share	4Q24 Vendor Revenue	4Q24 Market Share	4Q25/4Q24 Revenue Growth
1. Dell Technologies	\$12,562.51	10.0%	\$5,540.42	6.7%	126.7%
2. Super Micro	\$11,695.91	9.3%	\$5,005.07	6.1%	133.7%
3. IEIT Systems *	\$5,185.68	4.1%	\$3,878.11	4.7%	33.7%
3. Lenovo *	\$5,070.69	4.0%	\$3,783.65	4.6%	34.0%
5. Hewlett Packard Enterprise	\$3,873.11	3.1%	\$4,239.04	5.2%	-8.6%
ODM Direct	\$66,623.20	53.2%	\$41,511.46	50.5%	60.5%
Rest of Market	\$20,286.15	16.2%	\$18,277.91	22.2%	11.0%
<b>Total</b>	<b>\$125,297.26</b>	<b>100.0%</b>	<b>\$82,235.67</b>	<b>100.0%</b>	<b>52.4%</b>

Source: IDC Worldwide Quarterly Server Tracker, March 12, 2026.

## Worldwide Smartphone Market to Decline 13% in 2026, Marking the Largest Drop Ever Due to the Memory Shortage Crisis

Worldwide smartphone shipments are forecast to decline 12.9% year-on-year (YoY) in 2026 to 1.1 billion units, according to the International Data Corporation (IDC) Worldwide Quarterly Mobile Phone Tracker. This decline will bring the smartphone market to its lowest annual shipment volume in more than a decade. The current forecast represents a sharp decline from our November forecast amid the intensifying memory shortage crisis.

Regionally, markets with a high concentration of low-end smartphones are forecast to decline the most. Middle East & Africa will face the steepest drop at 20.6% YoY, while the world's largest two markets, *Bishop & Associates, Inc. ©2026* *March 2026 - 17*

China and Asia Pacific (excluding Japan and China), are expected to decline 10.5% and 13.1%, respectively. As the crisis begins to stabilize by mid-2027, IDC forecasts a modest recovery of 2% that year, followed by a stronger rebound of 5.2% YoY in 2028.

## **Demand Stabilizes After February's Spike**

Order activity remained strong in March, though slightly below February's peak.

The Orders Index registered 120, down from February's 12-month high of 122 but still well above January's 113. More than half of manufacturers (51%) reported rising orders, indicating demand momentum remains intact.

Production indicators reflect similarly steady conditions. The Shipments Index held at 117 for a second consecutive month, while Capacity Utilization also registered 117, suggesting that manufacturers continue to operate at a sustained pace to meet demand.

The Backlog Index eased to 105, down from 108 in February. Although still in expansion territory, the narrowing gap between orders and backlogs could signal improving throughput as manufacturers work through accumulated orders or a slight moderation in incoming demand.

Overall, the data suggest a relatively balanced environment, with demand remaining strong and production keeping pace.

### *Material Cost Pressures Rise*

While demand conditions remain supportive, the cost environment is becoming more challenging.

The Material Costs Index climbed to 139 in March, up from 129 in February, marking the highest level in more than a year. Nearly 78% of manufacturers reported rising material costs, pointing to broad-based input cost escalation across the electronics manufacturing ecosystem.

For many companies, these increases are not being fully offset by higher prices or productivity gains, creating growing margin pressure.

### *Memory Markets Tighten*

The survey also examined conditions in the global memory component market, where demand tied to AI infrastructure is reshaping supply dynamics. 94% of manufacturers report they can still source memory components, though 62% say availability is limited or lead times have extended.

Pricing pressures are widespread: 82% report rising memory prices, with 33% describing increases as significant.

Fifty-eight percent of survey respondents identified AI-related workload growth as the primary driver of these shifts. Additional factors contributing to tighter supply include data center expansion (41%) and preferential allocation to higher-margin customers (20%).

### *Limited Near-Term Relief*

Manufacturers do not expect immediate improvement. Only 14% of respondents believe memory sourcing conditions will improve within the next six months, while 36% say it is too early to assess.

## *Looking ahead*

Taken together, the data suggest the industry is entering a period in which demand remains strong, but cost pressures and component constraints are becoming more pronounced. Navigating these dynamics will require careful management of procurement, pricing, and production strategies in the months ahead.

## **India's PC Market Records Its Strongest-Ever Year, Shipping 15.9 Million Units in 2025**

India's traditional PC market—including desktops, notebooks, and workstations—recorded its strongest year ever in 2025, shipping 15.9 million units, growing 10.2% year over year (YoY), according to IDC's Worldwide Quarterly Personal Computing Device Tracker.

This marks the first time annual shipments have crossed the 15-million-unit milestone, surpassing the pandemic-driven peaks seen in FY2021 and FY2022.

The market also delivered strong momentum in the final quarter, with shipments reaching 4.1 million units in 4Q25, reflecting a robust 18.5% YoY growth.

## **Taiwan Manufacturing Growth Hits Five Months**

Taiwan's manufacturing sector expanded for a fifth consecutive month last month, with growth accelerating to the fastest pace in nearly four years despite fewer working days due to the Lunar New Year holiday, the Chung-Hua Institution for Economic Research said yesterday.

The official purchasing managers' index (PMI) rose 1.3 points to 58.5, marking the rapidest expansion since March 2022 as robust demand from artificial intelligence (AI) applications continued to support industrial activity, the Taipei-based think tank said.

PMI readings above 50 indicate expansion, while readings below the level signal contraction.

## **Foldable Phone Shipments May Near 30 million in 2026 as Apple Enters Market**

Apple's entry into the foldable phone market, alongside established players Samsung, Oppo, and Huawei, is set to expand consumer choice and accelerate global market growth. The shift stands to affect handset makers, app developers, and component suppliers.

## **No Chip Supply Shortage in Taiwan According to SEMI**

Taiwan's semiconductor companies are not facing imminent supply disruptions of essential chemicals or raw materials due to the war in the Middle East, but surges in material costs loom large, industry association SEMI Taiwan said yesterday.

The association's comments came amid growing concerns that supplies of helium and other key raw materials used in semiconductor production could become a choke point after Qatar shut down its liquefied natural gas (LNG) production and helium output earlier this month due to the conflict.

Qatar is the second-largest LNG supplier in the world and accounts for about 33 percent of global helium output. Helium is a critical and high-value byproduct of natural gas processing, but the shutdown caused price hikes.

"In the short term, I think we are not seriously worried about supply," SEMI Taiwan president Terry Tsao said in Taipei.

However, companies need to enhance supply chain resilience through “diversifying procurement sources and increasing supply chain transparency,” he said

The supply of helium in Taiwan is sufficient and safe as the nation’s major LNG suppliers have diversified procurement sources to include Australia and the US, the ministry said on Saturday last week. Qatar used to be a major LNG and helium supplier to Taiwan, the ministry said.

Helium plays a critical role in semiconductor manufacturing, particularly for cooling and inert atmospheres during lithography, etching and deposition, affecting the quality of wafers, the ministry said.

The global supply fluctuations would not significantly impact local semiconductor manufacturers’ chip production as they have been recycling helium to reduce costs and dependence on new supply of helium, it said.

SEMI Taiwan did not expect any supply disruption in key materials, if the Iran war is resolved within four to six weeks, given that most chip companies are expanding safety inventories and have supply chain resilience strategies in place after the COVID-19 pandemic.

## **AI Server Demand Driving Revenue, Hon Hai says**

Hon Hai Precision Industry Co said it expects strong revenue this quarter and for the whole year, driven by robust demand for artificial intelligence (AI) servers.

Although the first quarter is typically the off-season for the information and communications technology industry, revenue is expected to outperform the same period over the past five years on strong server shipments, Hon Hai chairman Young Liu told investors.

Server shipments this quarter are expected to grow by a high double-digit percentage sequentially, Liu said, adding that the company accounts for more than 40 percent of the global AI server market.

The company's AI server rack shipments are also expected to grow at a "high double-digit" pace sequentially this quarter, Liu said. This year as a whole, AI server rack shipments could double from a year earlier, he said.

About 80 percent of Hon Hai’s servers are based on AI graphics processing units, while the remaining 20 percent use AI application-specific ICs, he said.

Healthy demand for AI hardware helped Hon Hai achieve record profit and revenue last year, with annual net profit growing 24 percent to NT\$189.35 billion (US\$5.93 billion), or earnings per share (EPS) of NT\$13.61. Annual revenue rose 18 percent to NT\$8.1 trillion, even though net profit last quarter slipped 2 percent annually to NT\$45.21 billion and EPS decreased to NT\$3.23 from NT\$3.34 a year earlier.

The company attributed the decline in profit last quarter to higher tax expenses related to the repatriation of profits from overseas subsidiaries.

However, Hon Hai — which is Apple Inc’s primary iPhone assembler and makes servers powered by Nvidia Corp’s AI accelerators — said growth momentum in AI servers this year would remain solid as major cloud service providers continue to increase capital expenditures for AI infrastructure, Liu said.

The company is also optimistic about its general-purpose server business as AI development boosts demand for storage and computing, he said.

This quarter, the company expects strong growth in its cloud and networking products business, as well as its smart consumer electronics business — mainly smartphones — on the back of new product launches, he said.

Revenue from other segments — such as connectors, camera modules and auto parts — is also projected to post significant revenue growth as shipments increase, Liu said.

While Hon Hai's computing business is likely to be largely spared from the impact of memory shortages due to its focus on high-end models, the segment is still expected to see revenue decline this quarter as the broader PC market remains subdued, he said.

Last quarter, cloud and networking products accounted for 42 percent of Hon Hai's quarterly revenue of NT\$2.6 trillion, up from 26 percent a year earlier. Smartphones made up 39 percent, down from 51 percent a year earlier.

It was the first time revenue from cloud and networking products surpassed cellphones, Liu said.

Last year as a whole, cloud and networking products accounted for 40 percent of Hon Hai's total sales, smart consumer electronics 38 percent, computing products 15 percent and electronic components and other products 7 percent, company data showed.

Capital expenditures this year would grow by 30 percent from last year's NT\$160 billion, as the company aims to expand regional manufacturing, purchase automation equipment and expand production capacity, Hon Hai chief financial officer David Huang said.

## **MSI Says PC Shipments Expected to Fall Up to 20%**

Micro-Star International Co, a supplier of PCs and PC motherboards, yesterday said that global PC shipments would dip by as much as 20 percent this year as memory chip price surges dampen demand.

It is expected to be a challenging year for the PC industry and could be one of "the most difficult" periods since the company was established, MSI president Jeans Huang told an earnings conference in New Taipei City.

Huang said that severe memory chip shortages and tight supply of graphics processing units (GPU) were behind the lackluster outlook.

## **Apple to Move Some of its Production to Texas**

Apple Inc is to move some production of its Mac Mini desktop computer to the US from Asia, with a new manufacturing effort set to begin later this year at a Hon Hai Precision Industry Co facility in Houston, Texas, the Wall Street Journal (WSJ) reported.

The site comprises two main buildings, one currently used by Hon Hai, also known as Foxconn Technology Group), for assembling Apple's artificial intelligence servers and the other, a large warehouse, which would be converted into a 20,438.68m<sup>2</sup> Mac Mini production area, the WSJ reported.

The plan is the iPhone maker's most recent US investment, following its commitment announced in August last year to invest US\$600 billion in the country over the next four years.

## **Amazon Acquires Startup Rivr to Test Robots for 'doorstep delivery'**

Amazon has acquired Rivr, a Swiss robotics company developing machines for "doorstep delivery." Terms of the deal weren't disclosed.

Amazon quietly purchased the company, but it didn't publicize the acquisition. It announced the deal in a notice sent to third-party delivery contractors.

"We want to share that we've recently acquired RIVR, a company focused on technology that can help with doorstep delivery," Amazon wrote in the notice viewed by CNBC. "We believe this technology, when working alongside your [delivery associates], has the potential to further improve safety outcomes and the overall customer experience, particularly in the last steps of the delivery process."

An Amazon spokesperson told CNBC in a statement that the acquisition "reflects our commitment to a continued investment in research" and efforts to improve safety for its delivery employees.

The company relies on a network of thousands of third-party contractors that deliver packages exclusively for Amazon. These contractors are responsible for the so-called last mile portion of deliveries, meaning the process of ferrying packages from an Amazon warehouse to the customer's doorstep.

Amazon has spent more than a decade investing in automating more aspects of its warehouse operations. Amazon Robotics, the unit dedicated to these efforts, was formed after it acquired Kiva Systems, a manufacturer of warehouse robots, for \$775 million in 2012.

Last October, the company said it had deployed more than 1 million robots across its operations network.

In its notice to delivery service partner owners, Amazon said Rivr's technology, which includes a four-legged robot on wheels, will allow it to research and test how the devices can be integrated into delivery operations, including "helping DAs carry packages from delivery vehicles to customer doorsteps."

Amazon previously invested in Rivr through its \$1 billion Industrial Innovation Fund, which was launched in 2022 to back warehouse and logistics technologies. Bezos Expeditions, the venture capital firm started by Amazon founder and executive chairman Jeff Bezos, also participated in Rivr's \$22 million seed round last March. Rivr was formerly known as Swiss-Mile.

## **Dell Shrank Its Workforce By 10% for the Third Year in a Row — Without Layoffs**

Dell has methodically reduced its headcount by about 10% over the past year, relying on hiring freezes and reorganizations rather than mass layoffs.

In its latest federal filing, viewed by Business Insider, Dell reported that it had about 97,000 employees as of January 31. The headcount indicates an 11,000-person decrease in the company's workforce from 2025.

Dell now has 36,000 fewer employees than it did in February 2023, marking a nearly 30% reduction over three years. Dell has not had a major layoff announcement since August 2024, when it downsized by 12,500 employees.

# *The* Bishop Report

Dell repeatedly highlighted “restriction on external hiring” as a core cost-cutting strategy in the filing. By limiting hiring, the company was able to let natural attrition do more of the work and not hire replacements for employees who left voluntarily, shrinking overall headcount.

Dell also implemented a five-day return-to-the-office policy last year, ordering all employees back to the office starting in March 2025. The policy resulted in attrition, as many workers looked elsewhere for more flexible work structures instead of staying at the tech giant - and the company did not replace those workers.

Mass layoffs have surged in recent years. In 2026 alone, Amazon laid off 16,000 workers, Jack Dorsey’s Block reduced its workforce by 40% and software startup Atlassian cut the size of its team by 10%.



## WORLD CONNECTOR STATISTICS REGIONS – PRODUCTS – MARKET SECTORS 2016 – 2026F and 2031 FORECAST

Bishop & Associates has just released the 2026 edition of the World Connector Market Handbook. This comprehensive seven-chapter, 232-page report analyzes all aspects of the world electronic connector market. This report provides detailed connector statistics by top-level equipment sector and product category for North America, Europe, Japan, China, Asia Pacific, and the ROW region. Included is a complete chapter on worldwide connector industry results by region, top-level equipment sector, and product category. Data is provided for the years 2016 – 2025, and projections for 2026 and 2031 (including five-year CAGRs).

### ANALYSIS OF THE WORLD ELECTRONIC CONNECTOR MARKET

With growth over \$12.7 billion in US dollars, connector industry sales increased +14.7% from 2024 to 2025. All six regions saw growth, with the greatest growth in the Asia Pacific region where sales grew +32.6%, followed by China where sales grew +17.3%. Not since 2010, when sales in the Asia Pacific region grew +38.3%, have we seen sales grow this strongly in the Asia Pacific region. Although all other regions saw sales increase, growth in the Japanese region was only +2.9%, followed by the ROW region where sales grew a mere +0.7%.

#### World Connector Market by Region 2024 to 2025 with Percent Change

Region	2024	2025	Percent Change
North America	\$20,124.7	\$21,975.6	9.2%
Europe	\$17,417.3	\$18,874.1	8.4%
Japan	\$4,035.8	\$4,154.3	2.9%
China	\$28,003.5	\$32,841.8	17.3%
Asia-Pacific	\$13,483.5	\$17,882.7	32.6%
ROW	\$3,412.9	\$3,436.1	0.7%
<b>Total</b>	<b>\$86,477.7</b>	<b>\$99,164.6</b>	<b>14.7%</b>

\$ Millions

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# World Connector Market Handbook

## Regional Summary

Like in previous years, the mixed results in 2025 based on region of the world created a variety of changes to the five, 10-, and 20-year compound annual growth rates (CAGR). The continued low performance in Japan, heavily related to the value of the yen versus the dollar, increased the CAGR, but did not bring it out of negative territory, while the strong performance in all the other regions, increased the five-year CAGR when compared to the 10- and 20-year CAGRs. China who in past years has had the strongest CAGR, has seen it decline as connector sales although remaining positive, have seen lower growth than previously recorded, compounded by stronger growth in other regions.

### Regional Growth Rates 2025 – 2026F

Region	2025	2026F	% Change	Past 5 Year CAGR	Past 10 Year CAGR	Past 20 Year CAGR
North America	\$21,975.6	\$XX,XXX.X	X.X%	X.X%	Y.Y%	Z.Z%
Europe	\$18,874.1	\$XX,XXX.X	X.X%	X.X%	Y.Y%	Z.Z%
Japan	\$4,154.3	\$X,XXX.X	X.X%	X.X%	Y.Y%	Z.Z%
China	\$32,841.8	\$XX,XXX.X	X.X%	X.X%	Y.Y%	ZZ.Z%
Asia-Pacific	\$17,882.7	\$XX,XXX.X	X.X%	X.X%	Y.Y%	Z.Z%
ROW	\$3,436.1	\$X,XXX.X	X.X%	X.X%	Y.Y%	Z.Z%
<b>Total</b>	<b>\$99,164.6</b>	<b>\$XX,XXX.X</b>	<b>X.X%</b>	<b>X.X%</b>	<b>Y.Y%</b>	<b>Z.Z%</b>

\$ Millions

### Regional Growth Rates 2024 – 2025

Region	2024	2025	% Change	Past 5 Year CAGR	Past 10 Year CAGR	Past 20 Year CAGR
North America	\$20,124.7	\$21,975.6	9.2%	X.X%	Y.Y%	Z.Z%
Europe	\$17,417.3	\$18,874.1	8.4%	X.X%	Y.Y%	Z.Z%
Japan	\$4,035.8	\$4,154.3	2.9%	X.X%	Y.Y%	Z.Z%
China	\$28,003.5	\$32,841.8	17.3%	X.X%	Y.Y%	ZZ.Z%
Asia-Pacific	\$13,483.5	\$17,882.7	32.6%	X.X%	Y.Y%	Z.Z%
ROW	\$3,412.9	\$3,436.1	0.7%	X.X%	Y.Y%	Z.Z%
<b>Total</b>	<b>\$86,477.7</b>	<b>\$99,164.6</b>	<b>14.7%</b>	<b>9.6%</b>	<b>6.7%</b>	<b>4.9%</b>

\$ Millions

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# World Connector Market Handbook

## End-Use Equipment Sectors

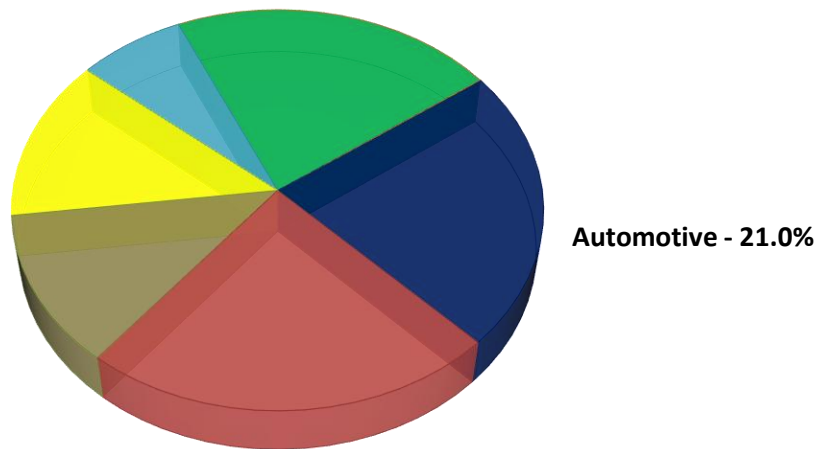
Telecom/datacom was the largest end-use equipment sector for electronic connector products with 2025 shipments of \$2X,XX0.7 million. Telecom/datacom was followed by automotive, where 2025 sales grew X.X% to \$2X,XXX.6 million. It is anticipated in 2026 that telecom/datacom will remain the largest end-use equipment sector, once again followed by automotive. Showing the smallest growth in 2025 was medical equipment, where sales grew to \$XXX.X million, an increase of +5.9% over 2024.

### World Connector Market by Equipment Sector

Sector	2025	2026F	Percent Change
Computers & Peripherals	XX,XXX.X	\$X,XXX.X	Y.Y%
Business/Office Equipment	\$961.5	\$X,XXX.X	Y.Y%
Instrumentation	\$2,659.7	\$X,XXX.X	Y.Y%
Medical Equipment	\$2,924.1	\$X,XXX.X	Y.Y%
Industrial	\$12,362.3	\$X,XXX.X	Y.Y%
Automotive	XX,XXX.X	\$XX,XXX.X	Y.Y%
Transportation (non-auto)	\$6,690.9	\$X,XXX.X	Y.Y%
Military/Aerospace	\$5,833.9	\$X,XXX.X	Y.Y%
Telecom/Datacom	XX,XXX.X	\$XX,XXX.X	Y.Y%
Consumer	\$4,405.1	\$X,XXX.X	Y.Y%
Other	\$3,447.8	\$X,XXX.X	Y.Y%
<b>Total</b>	<b>\$99,164.6</b>	<b>\$X,XXX.X</b>	<b>Y.Y%</b>

\$ Millions

### World Connector Market - Top Five Equipment Sectors – 2025



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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>.

- ❑ **Report M-700-26**      **World Connector Market Handbook (March 2026) NEW**
- ❑ **Report F-2025-02**      **Connector Industry Forecast (December 2025) NEW**
- ❑ **Report M-121-25**      **2025 Top 100 Connector Manufacturers (August 2025) NEW**
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- ❑ **Report C-150-24**      **History of M&A in the Connector Industry 1950-2024 (October 2024)**
- ❑ **Report P-520-24**      **The Rectangular Input/Output Connector Market 2024 (July 2024)**
- ❑ **Report P-799-24**      **World Cable Assembly Market (February 2024)**
- ❑ **Report P-606-23**      **Connector Types and Technologies Poised for Growth (October 2023)**
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- ❑ **Report M-1200-22**      **Military Ground Vehicle Market for Connectors (October 2022)**
- ❑ **Report P-675-22**      **Copper and Fiber Connectivity in the Data Center (July 2022)**
- ❑ **Report T-800-22**      **2022 North American Cable Assembly Manufacturers (May 2022)**
- ❑ **Report M-1010-22**      **World Automotive Connector Market (April 2022)**
- ❑ **Report P-420-22**      **IC Sockets – Systems & Connector Forecast 2020-2030 (January 2022)**

### 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](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.



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