

Double-Digit Sales Growth Continues Led by a Strong Book-to-Bill

April bookings increased by +47.6%, while billings increased by +20.9%.

Regional Performance:

Year-to-date, sales for April are positive in all regions. The greatest growth, as was seen in the last four months, is in the Asia Pacific region, where sales grew +35.9%, followed by China where sales increased +20.3%. Although still positive, the weakest growth was once again seen in the Japanese region where sales grew +3.7%. From a booking perspective, all regions showed positive year-over-year double-digit growth, with the greatest growth in the North American region at +65.8%, followed by Asia Pacific at +64.9%. The least growth occurred in ROW, where sales grew +23.3% YOY. Sequentially, all regions but Europe saw growth, where sales declined -20.4%. See page 5.

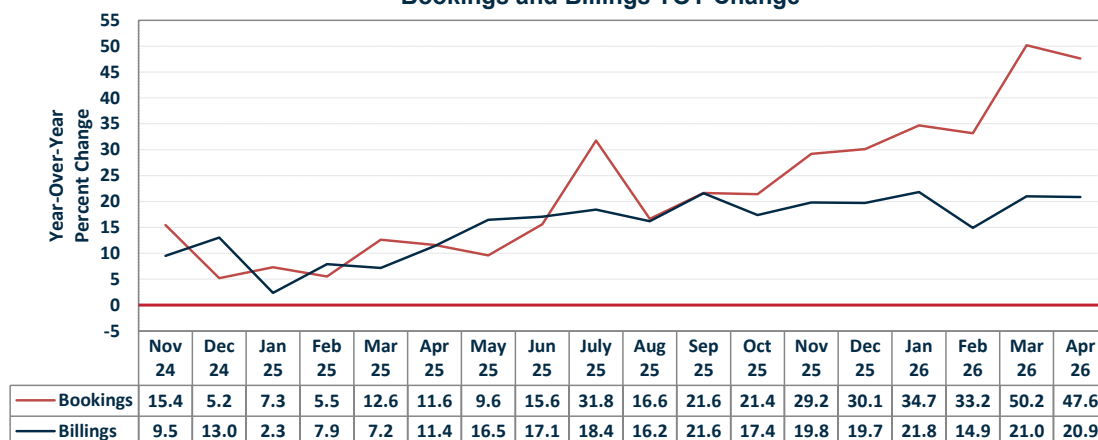
2026 Currency Impact:

The industry registered a YOY increase in sales in April 2026, of +20.9 in USD and +17.5% in local currency.

NEW BISHOP RESEARCH REPORT

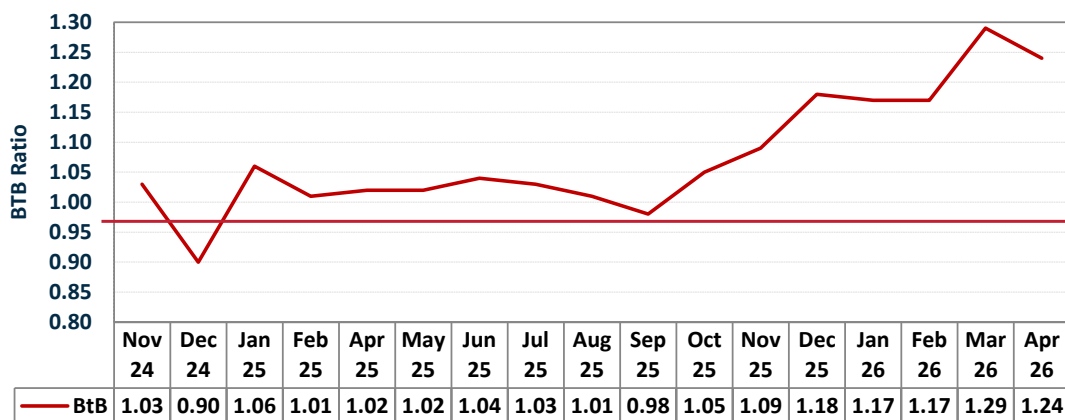
Connector Market Handbook Research Report

Bookings and Billings YOY Change



The book-to-bill ratio in April was 1.24, down from 1.29 in March. This is the 17th time in the last 18 months that the book-to-bill was over 1.00.

Connector Industry Book-to-Bill

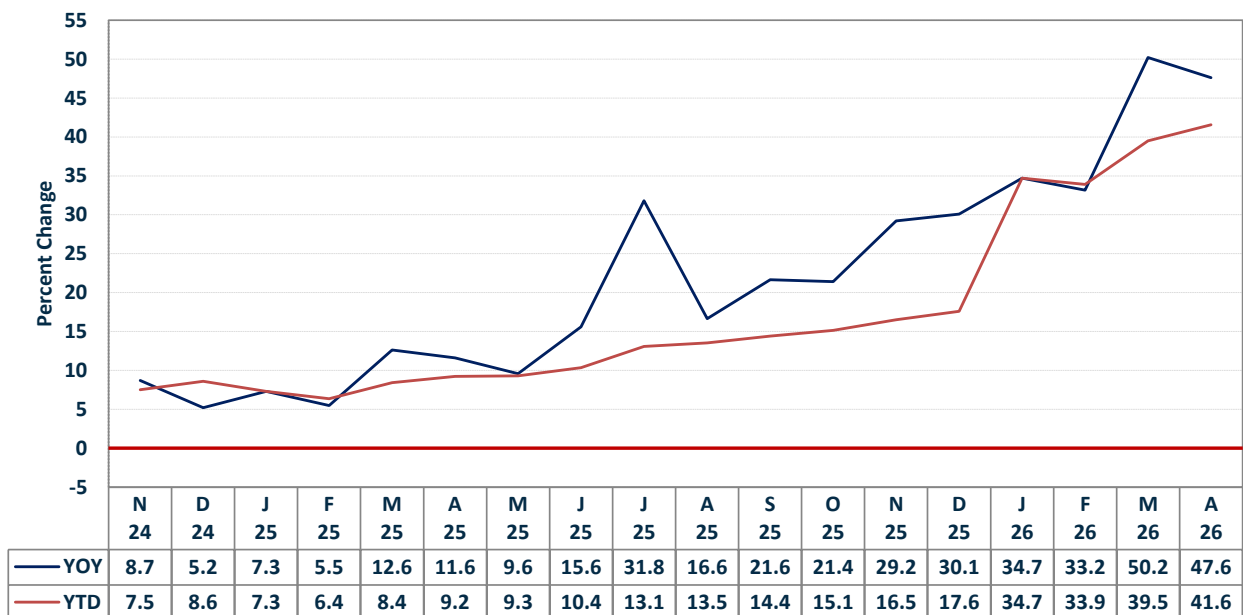


Booking Highlights and Conclusions

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%	15.3%	-1.4%	12.6%	49.6%	4.4%	8.4%	38.9%
Apr	3.2%	-0.8%	-2.5%	10.2%	11.6%	47.6%	5.8%	9.2%	41.6%
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



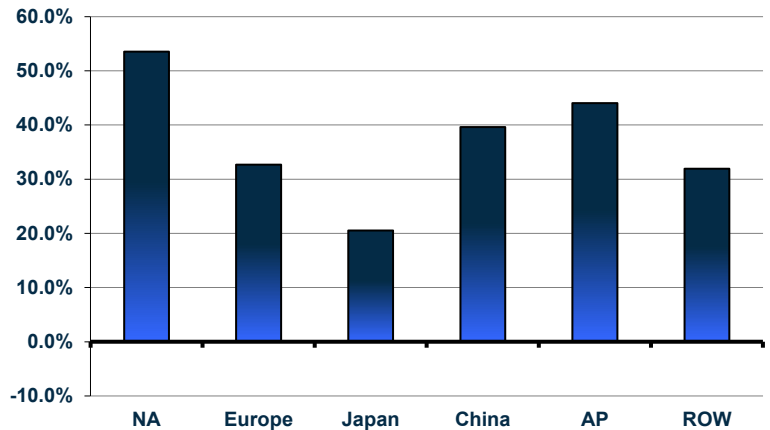
- April bookings increased +47.6% year-over-year.
- Orders decreased -2.5% on a sequential basis in April.
- The book-to-bill ratio for April was 1.24, down from 1.29 in March.

Regional Performance: BOOKINGS

April 2026 Bookings

Region	Sequential	YOY	YTD
NA	2.7%	65.8%	53.5%
Europe	-20.4%	33.0%	32.7%
Japan	4.6%	24.1%	20.5%
China	5.7%	39.6%	39.6%
AP	5.2%	64.9%	44.0%
ROW	6.5%	23.3%	31.9%
Total	-2.5%	47.6%	41.6%

Year-To-Date Bookings by Region



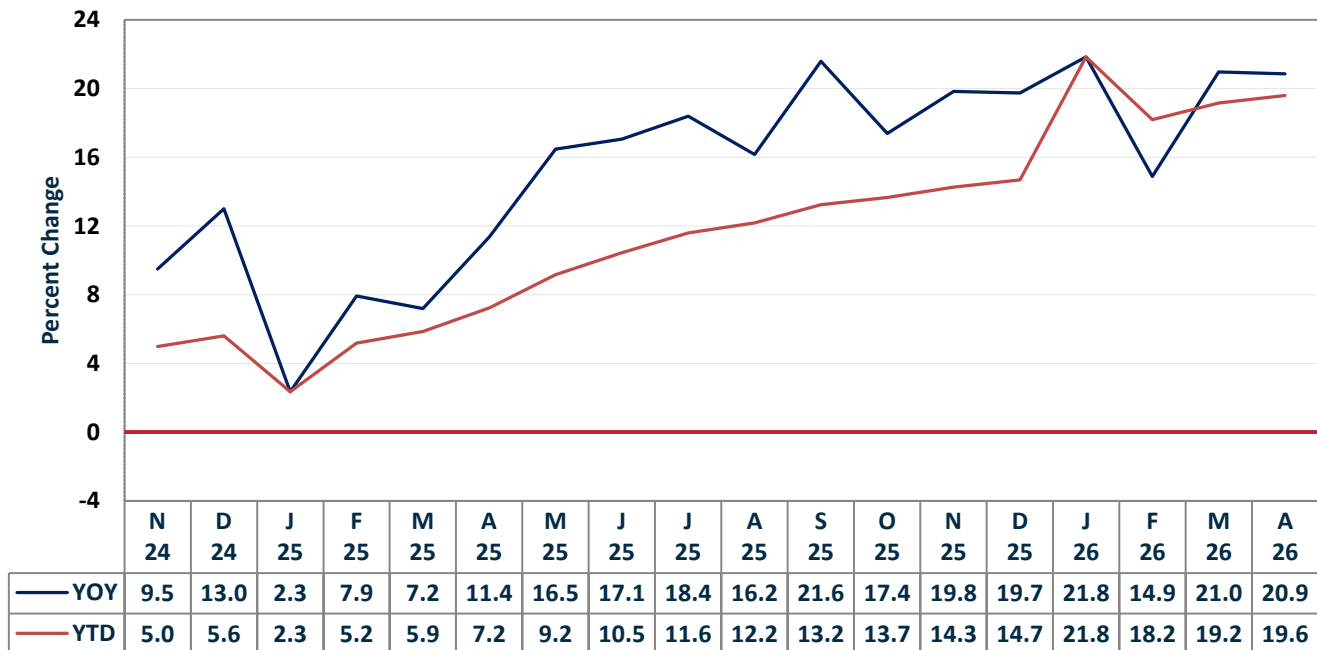
- Year-to-date, April bookings increased +41.6%, with the greatest growth in the North American region, where bookings increased +53.5%, followed by Asia Pacific with growth of +44.0% and the Chinese region where bookings increased +39.6%. The lowest growth was seen in the Japanese region, where year-to-date bookings increased +20.5%.
- From a year-over-year perspective, total world sales grew +47.6%, with the greatest growth in North American region, at +65.8%, followed by the Asia Pacific region, where year-over-year bookings increased +64.9%. The smallest growth was seen in Japan, where year-over-year sales increased a healthy +24.1%.
- Sequentially, sales grew in all regions except Europe, where sales decreased -20.4%. The greatest growth was in the ROW region where sales increase +6.5%, followed by China where sales grew +5.7%. Unfortunately this positive growth was not enough to bring the overall world up to positive territory, and sequentially world sales declined -2.5%.
- Year-over-year total world order growth has now been positive for 25 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%	5.2%	-1.1%	7.2%	21.1%	0.4%	5.9%	19.2%
Apr	1.7%	1.1%	1.0%	10.1%	11.4%	20.9%	2.7%	7.2%	19.6%
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

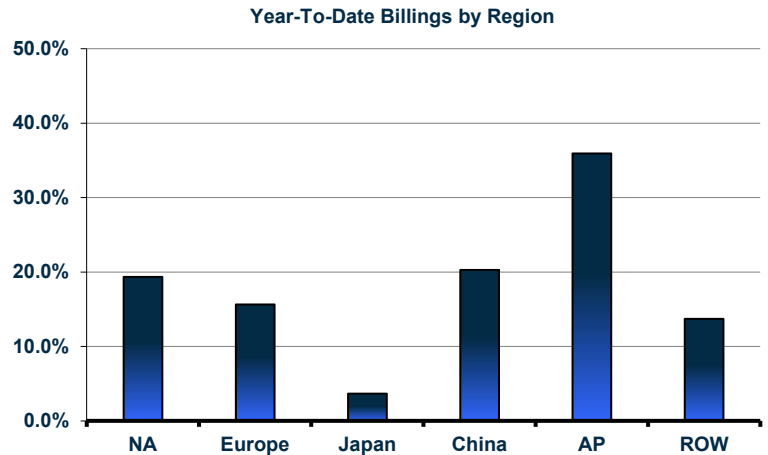


- April billings grew +20.9% year-over year and +19.6% year-to-date.
- Sequentially, April billings increased +1.0%.
- Year-over-year sales growth has now been positive for 25 consecutive months and year-to-date for 28 consecutive months.

Regional Performance: BILLINGS

April 2026 Billings

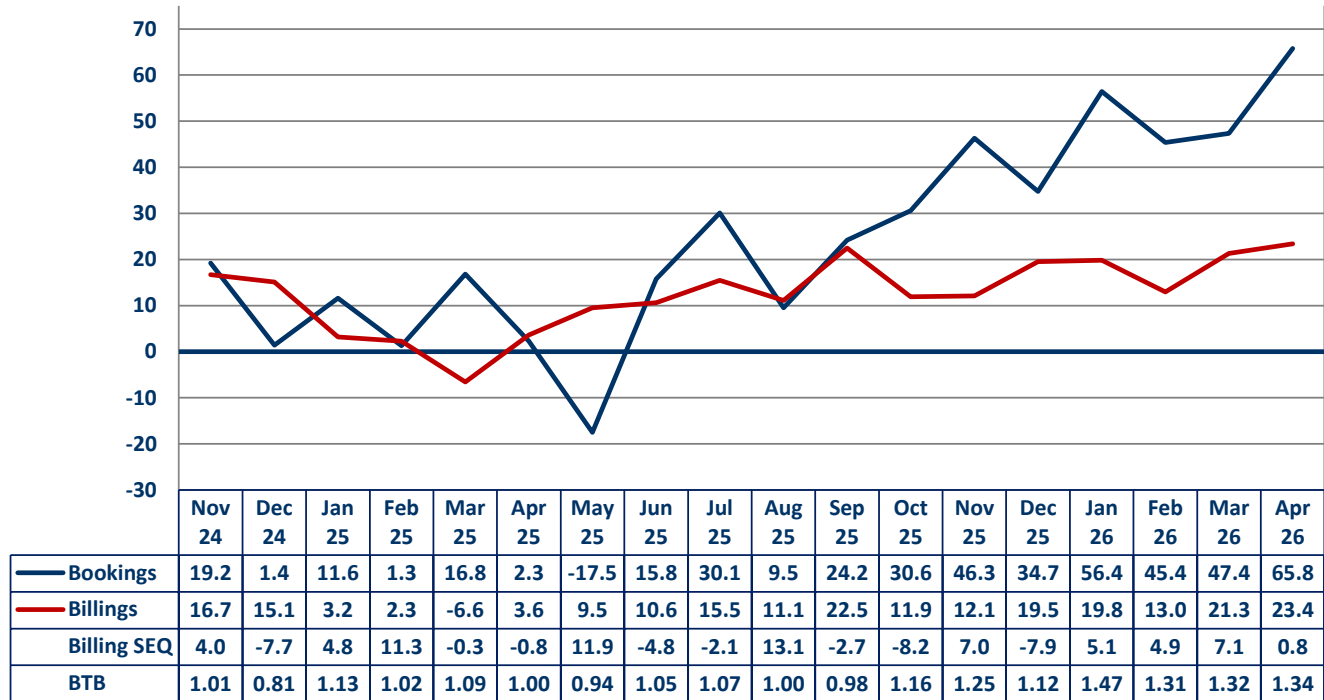
Region	Sequential	YOY	YTD
NA	0.8%	23.4%	19.4%
Europe	-1.2%	14.5%	15.7%
Japan	0.3%	1.7%	3.7%
China	8.1%	26.0%	20.3%
AP	-6.2%	26.3%	35.9%
ROW	-4.2%	21.2%	13.7%
Total	1.0%	20.9%	19.6%



- April connector sales increased by +20.9% compared to the same period last year, and +19.6% year-to-date.
- Sequentially, similar to last month, only half the regions showed an increase. The greatest increase was in the Chinese region, at +8.1%, followed by the North American region, where sequential sales increased +0.8%. The greatest decline was seen in the Asia Pacific region, where sales decreased -6.2%, followed by the ROW region where sales decreased -4.2%.
- Year-over-year, all six regions saw an increase, with the greatest increase in the Asia Pacific region where sales increased +26.3%, followed by the Chinese region, where sales increased +26.0% and the North American region where sales increased +23.4%.

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**

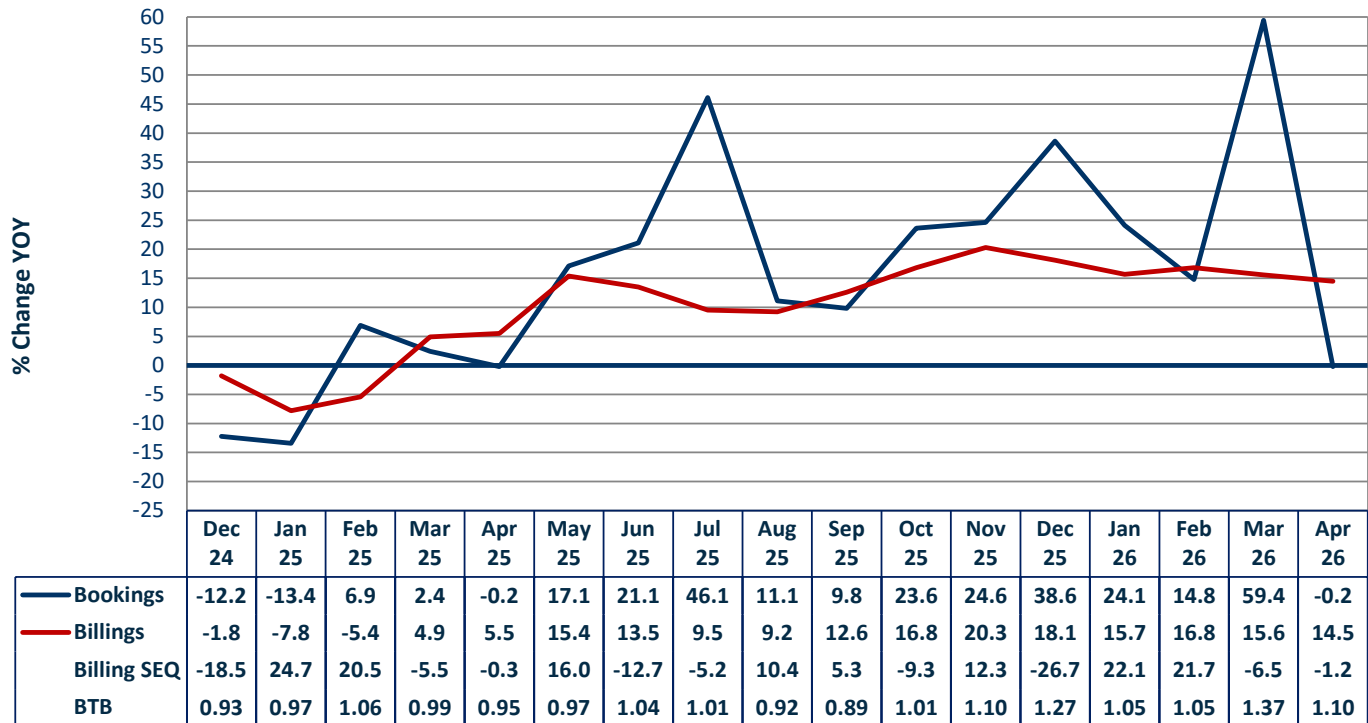


North America Performance

- Sales increased +23.4% year-over-year in April, while orders increased +65.8%, up from +47.4% in March. Sequentially, North American billings increased +0.8%, down from +7.1% in March. The book-to-bill ratio increased to 1.34, up from March's 1.32.
- The US unemployment rate remained unchanged in April at 4.3%, in line with market expectations. However, the number of unemployed rose by 134,000 to 7.37 million, while total employment fell by 226,000 to 162.62 million, according to Trading Economics.
- In April, the Consumer Price Index for All Urban Consumers rose 0.6%, seasonally adjusted, and rose 3.8% over the last 12 months, not seasonally adjusted. The index for all items less food and energy increased 0.4% in April (SA); up 2.8% over the year (NSA), the U.S. Bureau of Labor Statistics reported.
- The number of new vehicles sold in the U.S. in April 2026 (preliminary figures including estimates for GM/Stellantis/Telsa, etc.) aggregated by MarkLines as of May 2, totaled 1,374,365 units, down 6.0% year-over-year. April had the same number of selling days in 2026, as in 2025.
- The University of Michigan's Consumer Sentiment Index dropped to a record low of 48.2 in early May 2026, missing market expectations of 49.5 and falling below April's 49.8. The current conditions component declined about 9% to 47.8, driven by growing concerns over high prices affecting personal finances and buying conditions for major purchases, 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 Bookings and Billings
Year-Over-Year Percentage Change
& Book-To-Bill Ratio



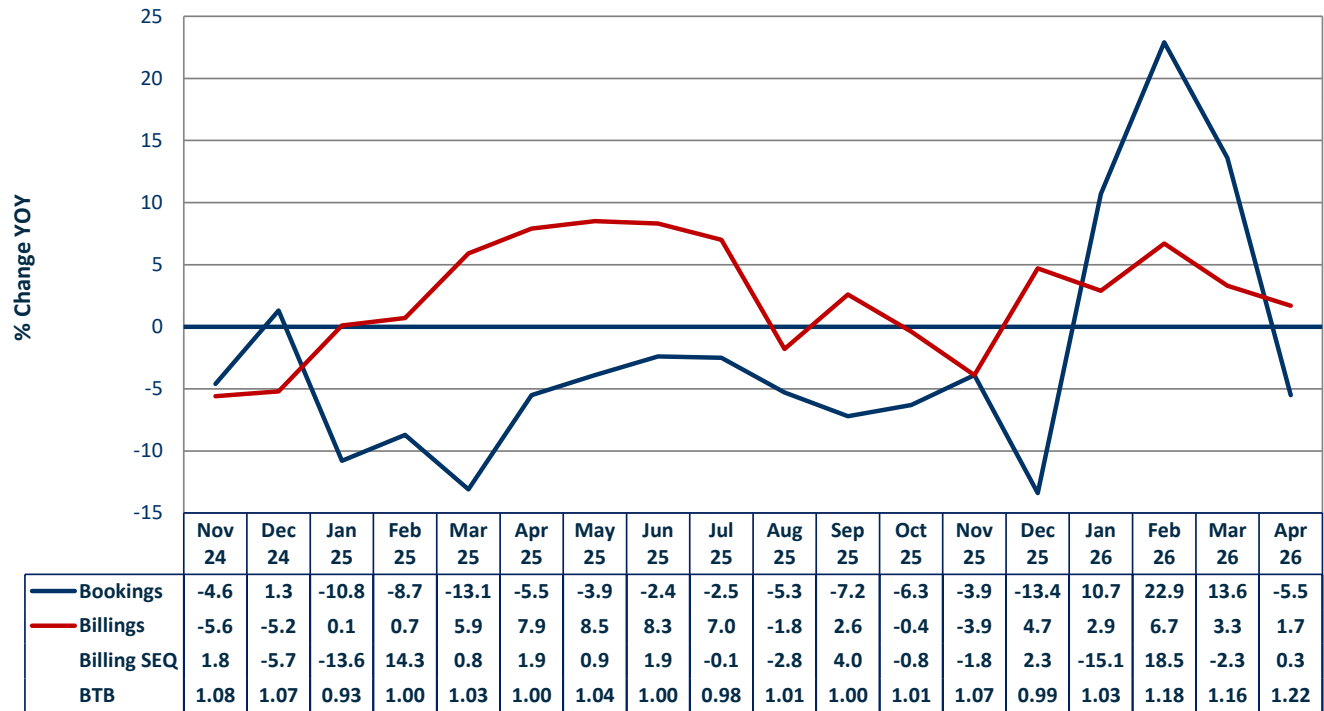
Europe Performance

- Bookings decreased -0.2% in April. This is first time since April of 2025, that bookings have decreased. Billings increased by +14.5%, down from +15.6% in March. Sequentially, sales decreased by -1.2%, the second time since December 2025, that sequential billings showed a decrease. The book-to-bill ratio was 1.10, down from 1.37 in March.
- "Passenger car registrations in the EU for April 2026 grew by 6.9% year-over-year. This upward trajectory was largely propelled by fleet renewal incentives and government scrapping programs, bringing the cumulative growth over the first four months of the year to +8.2% compared to the same period in 2025," according to ACEA.
- "The Euro Area seasonally adjusted unemployment rate "in March* 2026 was 6.2%, down from 6.3% in February 2026 as well as in March 2025. The EU unemployment rate was 6.0% in March 2026, stable compared with February 2026 and with March 2025. according to Eurostat.
- "The Eurozone Economic Sentiment Indicator (ESI) fell for the third consecutive month to 93.0 in April 2026, hitting its lowest level since November 2020 and missing market expectations of 95.2, reflecting growing concerns over the economic outlook, driven by the escalating Iran war.

**April 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**

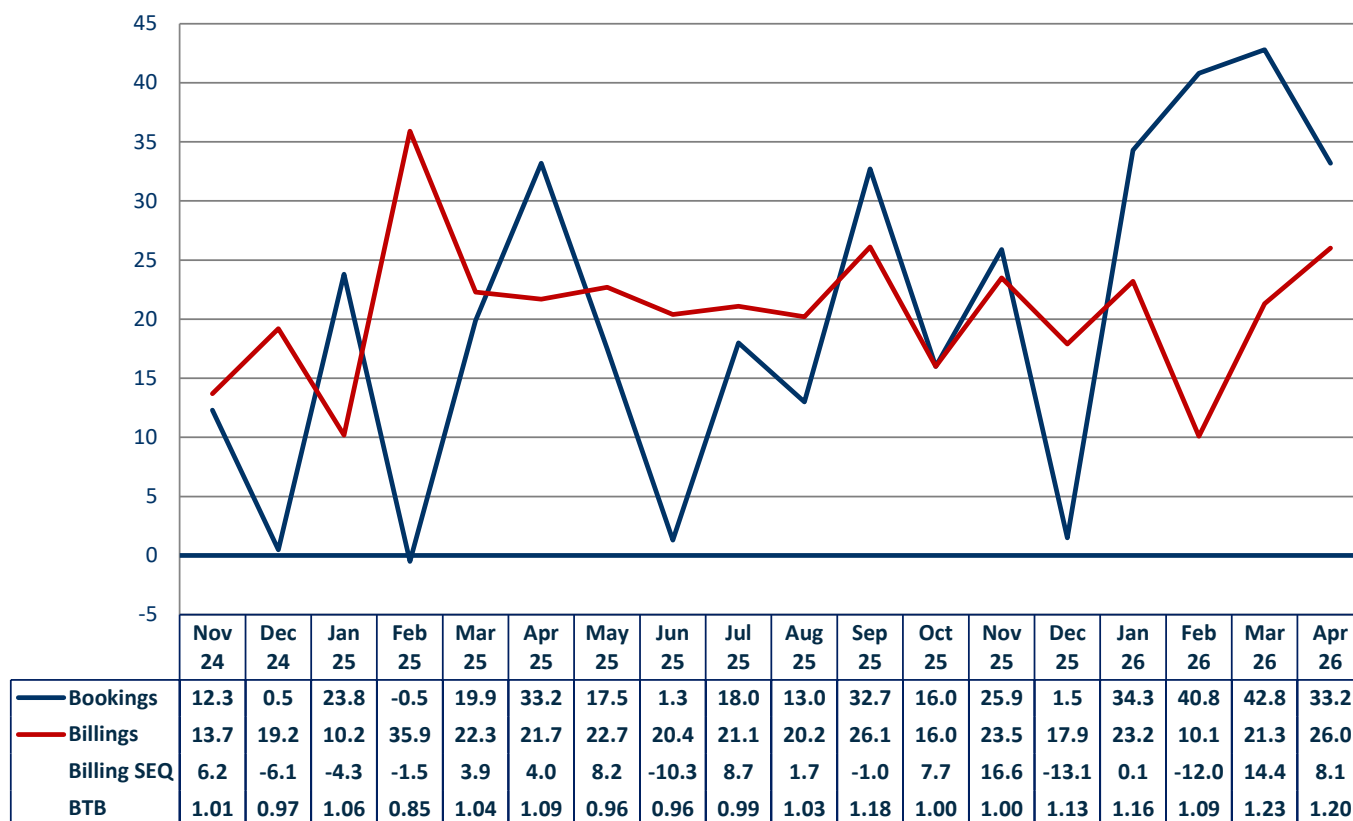


Japan Performance

- April year-over-year bookings decreased -5.5%, down from +13.6% in March, while billings increased +1.7%, down from +3.3% in March. Sequentially, sales increased +0.3%, up from -2.3% in March. Japan's book-to-bill ratio increased to 1.22, up from 1.16 in March.
- "Core consumer prices in Tokyo's central wards rose 1.5% YoY in April 2026, easing from 1.7% in the previous month and missing market expectations for 1.8%", according to Trading Economics.
- "Japan's S&P Global Composite PMI slipped to 51.1 in May from a final 52.2 in the previous, flash data showed. It marked the slowest private-sector growth since December", according to Trading Economics.
- "Japan's unemployment rate came in at 2.5% in April, unchanged from the previous month as many sectors continue to face worker shortages, reports Xinhua, citing data from the Ministry of Internal Affairs and Communications".
- Japan's new vehicle market saw a 9.1% year-on-year increase in April 2026, totaling 373,952 units. This was driven by a surge in light truck sales, with Toyota capturing a massive 37.7% market share. Regular passenger vehicles fell by 2.3%, while light trucks grew by 33%, according to Just Auto.
- Exports climbed 14.8%, much sharper than anticipated and caused by a surge in semiconductor shipments in April, with such shipments rising 41.6% year-on-year", 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**

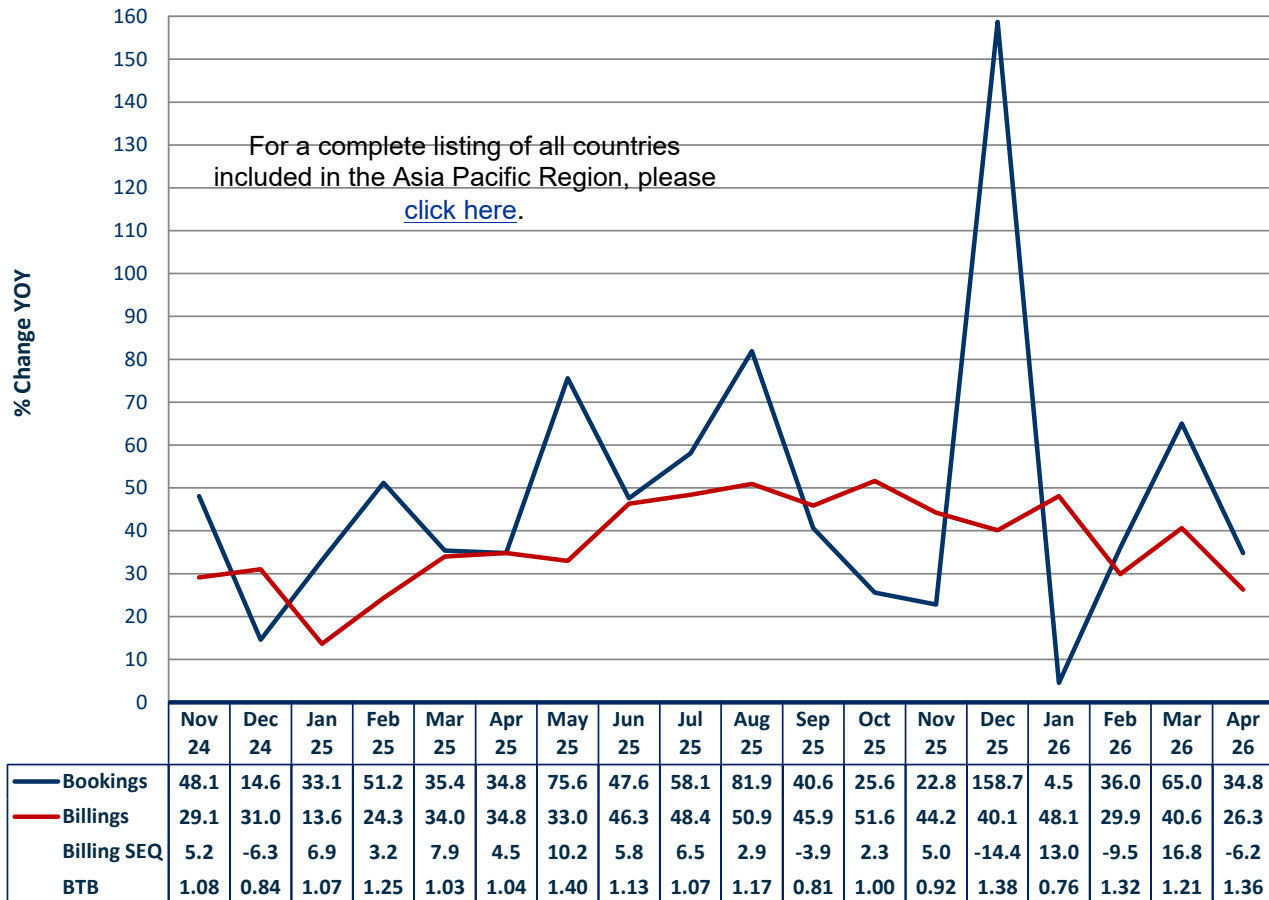


China Performance

- China's April sales grew +26.0% on a year-over-year basis. Bookings increased by +33.2% in April, while sequentially, sales increased by +8.1%. The book-to-bill decreased to 1.20, down from 1.23 in March.
- In April 2026, China's "consumer price index (CPI) increased by 1.2% YoY," according to National Bureau of Statistics of China. From Jan. to April, on average, China's CPI increased by 0.9% YoY.
- "China's total vehicle sales reached 2.526 million units in April 2026, marking a 2.5% year-on-year decline. Domestic sales dropped 21.6% to about 1.4 million units due to weakening consumer demand for traditional vehicles, but overall numbers were bolstered by a 74% surge in vehicle exports according to data from the China Association of Automobile Manufacturers (CAAM).
- China's General Composite PMI rose to 53.1 in April 2026 from March's three month low of 51.5, signaling a solid pickup in overall business activity as both manufacturing output and services expanded at a faster pace", according to Trading Economics.
- "China's surveyed urban unemployment rate stood at 5.2% in April 2026, representing an average of 5.3% for the first four months, coming in below market expectations of 5.3% and marking its lowest level since January 2026", 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.

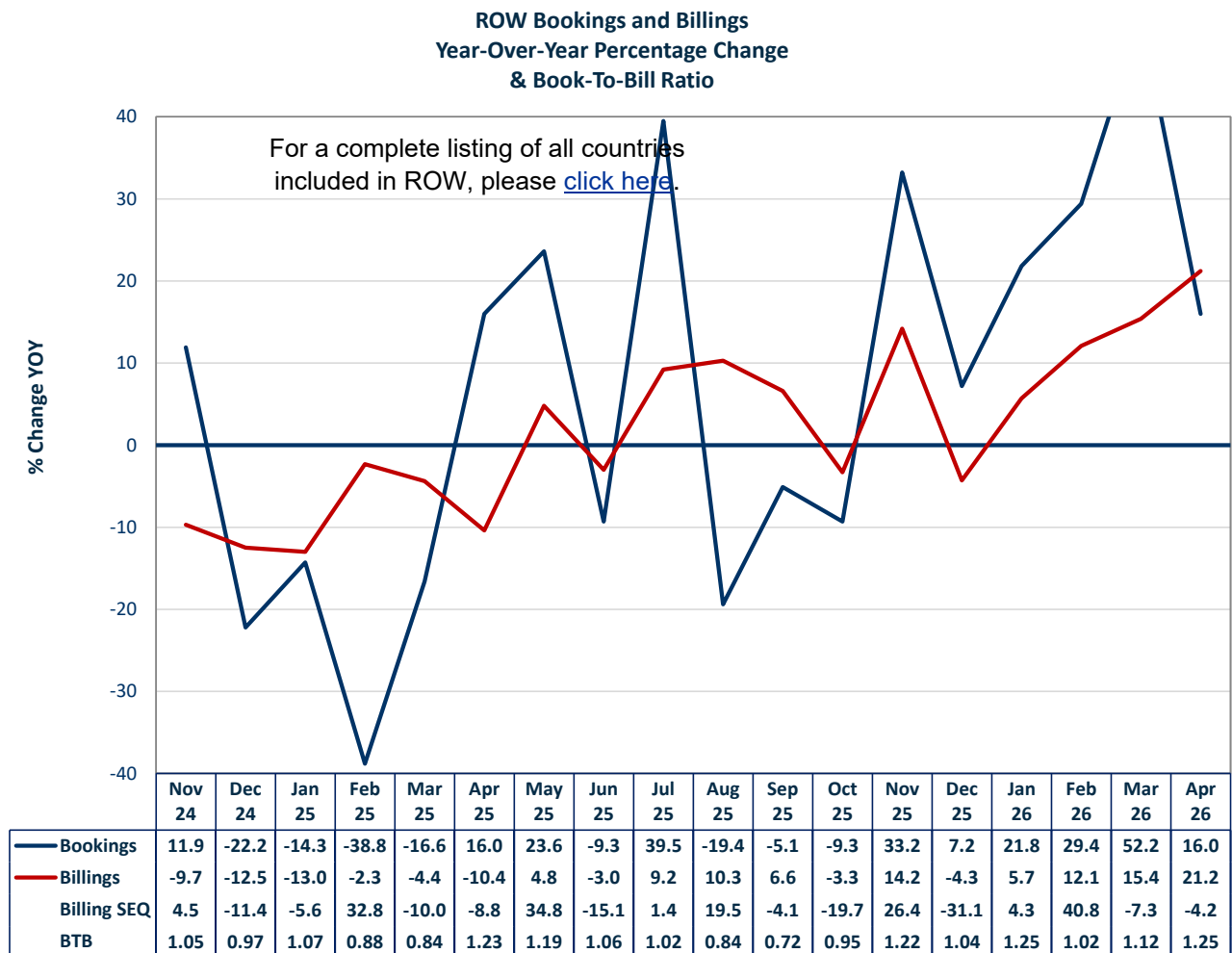
**Asia Pacific Bookings and Billings
Year-Over-Year Percentage Change
& Book-To-Bill Ratio**



Asia Pacific Performance

- Year over year, April orders were up +34.8%, down from March's strong +65.0% increase. Billings increased by +26.3%, down from +40.6% in March. Sequentially, sales decreased by -6.2%. The book-to-bill ratio increased to 1.36 in April after decreasing to 1.21 in March.
- "India's wholesale prices increased 8.3% year-on-year in April 2026, accelerating sharply from a 3.88% rise in March and surpassing expectations of 4.4%. This marked the fastest growth since Oct. 2022, driven by a faster rise in manufacturing and food costs and a sharp increase in fuel prices due to the impact of the Middle East crisis". "India's HSBC Manufacturing PMI fell to 54.3 in May 2026 from 54.7 in April, marking the second weakest improvement in factory conditions in nearly four years, ahead only of the level seen in March," both according to Trading Economist.
- South Korea's exports in April 2026 surged by 48% YoY to a total of \$85.89 billion, maintaining shipments above the \$80 billion mark for the 2nd consecutive month. This stellar growth was driven by the global AI investment boom, resulting in a record-breaking month for the tech sector, led by chip shipment growth of 173.5% YoY to \$31.9 billion," according to Trading Economics.

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.



Rest of World Performance

- Orders increased by +16.0% in April, the fifth time in the last six months when bookings were in the double digits. Billings increased by +21.2% year-over-year, up from +15.4% in March. Sequentially, sales decreased by -4.2%, up from -7.3% in March, but still in negative territory. The book-to-bill ratio was 1.25.
- "Brazil's annual inflation rate accelerated to 4.39% in April 2026, up from 4.14% in March, coming in just below market expectations of 4.41%. On a monthly basis, consumer prices rose by 0.67%, marking the highest increase for the month of April since 2022 ", while their S&P Global Manufacturing PMI rose to 52.6 in April 2026, up from 49.0 in March. This marked a return to expansionary territory, hitting a 14-month high and representing the first growth in the country's factory activity in a year", according to Trading Economics.
- "South Africa's seasonally adjusted Absa Purchasing Managers' Index (PMI) rose to 52.6 in April from 49.0 in March, signaling a renewed expansion in factory activity for the first time since last September", "Activity grew at its fastest pace since October 2024, driven by a rebound in output and new orders amid stronger domestic demand, while exports declined", 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
GDP Growth YOY	2.0% Steady	0.9 to 1.1% Steady	2.1% Up	5.0% Up	N/A	N/A
Industrial Production Growth	0.7% Up	0.8% Up	2.4% Up	4.1% Slowing	N/A	N/A
Manufacturing PMI*	52.7 Steady	52.2 Up	55.1 Up	50.3 Steady	N/A	N/A
Inflation Rate	3.8% Up	3.0% Up	1.4% Down	1.2% Up	N/A	N/A
Unemployment Rate	4.3% Steady	6.2% Steady	2.7% Steady	5.2% Down	N/A	N/A
Retail Sales Growth YOY	4.9% Up	1.2% Down	1.7% Up	0.2% Down	N/A	N/A
April Connector Sales	23.4%	14.5%	1.7%	26.0%	26.3%	21.2%
YTD Connector Sales	19.4%	15.7%	3.7%	20.3%	35.9%	13.7%
April Connector Orders	65.8%	33.0%	24.1%	39.6%	64.9%	23.3%
YTD Connector Orders	53.5%	32.7%	20.5%	39.6%	44.0%	31.9%

* Purchasing Manager Index - Below 50 is contracting factory activity

Key Take Aways:

- In April, YTD and YOY bookings were up in all regions in the double-digit range, with the greatest growth year-over-year in North America, followed by the Asia Pacific region.
- On a positive note, the manufacturing PMI in all regions in April was either steady or up, with the greatest increase in Japan, where PMI was 55.1. This is in line with industrial production growth, which was up in all regions but China, where although the number was higher than the other regions, it was slowing in comparison to previous months.
- Except for China, where unemployment was actually down in April 2026, the unemployment rate in all other regions is remaining fairly steady, with the greatest unemployment rate recorded in Europe, at 6.2%.

The Industry Backlog Is 14.1 Weeks

April 2026 was another great month for the connector industry. Orders totaled \$11,480 million, up +47.6% over the same period in 2025. Sales were \$9,404 million, up +20.9%.

The industry shipped \$2,240 million per week in April. Assuming the same weekly shipments, the industry has 14.1 weeks of backlog (ending backlog \$31,593 million divided by \$2,240 million).

Industry Backlog

	Full Year 2025	Apr 2026
BtB Ratio	1.00	1.24
Beginning Backlog	\$21,287	\$24,067
YTD Bookings	\$101,868	\$43,717
YTD Billings	\$99,165	\$36,191
Ending Backlog	\$24,067	\$31,593
Backlog in Weeks	12.6	14.1

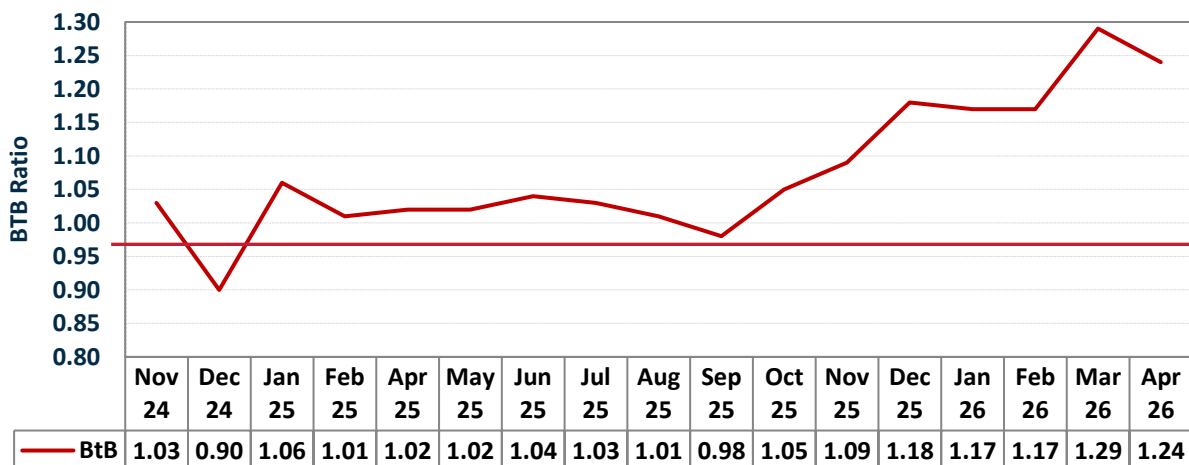
\$ Millions

Bishop & Associates, ©2026

Connector demand continues to be very strong year-over-year. This marks 11 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 16 out of the 18 months, or 88.9% of the time.

Connector Industry Book-to-Bill



Currency Fluctuations Reduce Performance between USD and Local Currency

The dollar consistently fluctuates against the euro, the yen, and the yuan. The following table measures the impact for April 2025 versus April 2026 and shows results for these three currencies.

Change in Local Currency to One USD 2025 YTD versus 2026 YTD

Currency	2025	2026	% Change
Euro	0.8912	0.8557	4.2%
Yuan	7.2912	6.8410	6.6%
Yen	144.3541	159.2405	-9.3%

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

Industry Sales Performance April 2026 USD-vs-Local Currencies

Region	U.S.\$	Local Currency
North America	23.4%	23.4%
Europe	14.5%	9.4%
Japan	1.7%	2.5%
China	26.0%	18.2%
Asia Pacific	26.3%	26.3%
ROW	21.2%	21.2%
World	20.9%	17.5%

Connector sales in April of 2026 increased +17.5% when measured in local currencies, versus an increase of +20.9% in US dollars.

2026 Outlook: Historical Analysis

Over the past 16 years (2010-2025), April sales averaged 7.9% of full year sales. We shipped \$9,404 million in April 2026. Assuming history repeats, we will ship \$119,038 million in 2026. This is a +20.0% increase over 2025 sales of \$99,165.

The least April represented of full year sales was 7.7% and the most 8.1%. Using historical performance, we can calculate a range of possible outcomes for 2026.

Historical Forecast Analysis

April	Percent Full Year	April 2026 Sales	Full Year 2026 Fcast	Percent Growth
High	8.1%	\$9,404	\$116,099	17.1%
Average	7.9%	\$9,404	\$119,038	20.0%
Low	7.7%	\$9,404	\$122,130	23.2%

\$ Millions

Bishop & Associates, ©2026

Clearly, we are in a position to have one of the best growth years in industry history. The order backlog is large, \$31.6 billion, and new orders are achieving year-over-year double digit growth.

Caution: Unusually high order growth in the past has created demand bubbles. Specifically, the dot.com 2001 - 2002 bubble and the 2008 - 2009 housing financial crisis. The impact on sales is shown in the following table.

Decline in Annual Sales

Period	% Change in Sales	Reason
2001	-18.8%	Dot-com
2002	-6.9%	Dot-com
2009	-21.8%	Housing/Financial

Both downturns were preceded by order cancellations. Needless to say, we will analyze industry backlog monthly for any sign of this.

Understand, we are NOT forecasting an AI bubble, but just suggesting companies should be a little conservative in investing additional capital.

Connector Sales & Order Trends

Connector orders have exhibited a double-digit increase for 11 consecutive months. Sales have shown a double-digit increase for the last 13 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%
Year-to-Date	17.6%	14.7%

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

Month	Orders	Sales
January	34.7%	21.8%
February	33.2%	14.9%
March	50.2%	21.0%
April	47.6%	20.9%
May		
June		
July		
August		
September		
October		
November		
December		
Year-to-Date	41.6%	19.6%

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 25 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!

Connector orders are up +41.1% through April 2026. This sets a record for the connector industry. Hopefully, this is not an AI bubble, but solid demand related to datacenter growth.

Significant Events

April 2026 News

Manufacturing Steady in April as Inflation and Iran War Weigh In

U.S. manufacturing activity continued to expand modestly in April. It held the line for a fourth consecutive month, despite a dramatic surge in raw material costs and deepening geopolitical anxieties.

The Institute for Supply Management (ISM) reported that its Manufacturing Purchasing Managers' Index (PMI) registered 52.7% in April. This matched the March reading. The data signals that the broader U.S. economy has continued to expand for the 18th consecutive month.

Susan Spence, chair of the ISM Manufacturing Business Survey Committee, stated, "In April, U.S. manufacturing activity remained in expansion territory. It grew at the same pace as the month before." A reading above 50% indicates sector expansion. The current level historically aligns with a 1.8% annualized increase in real gross domestic product.

Manufacturing at a Glance						
INDEX	Apr Index	Mar Index	% Point Change	Direction	Rate of Change	Trend* (months)
Manufacturing PMI®	52.7	52.7	0.0	Growing	Same	4
New Orders	54.1	53.5	+0.6	Growing	Faster	4
Production	53.4	55.1	-1.7	Growing	Slower	6
Employment	46.4	48.7	-2.3	Contracting	Faster	31
Supplier Deliveries	60.6	58.9	+1.7	Slowing	Faster	5
Inventories	49.0	47.1	+1.9	Contracting	Slower	12
Customers' Inventories	39.1	40.1	-1.0	Too Low	Faster	19
Prices	84.6	78.3	+6.3	Increasing	Faster	19
Backlog of Orders	51.4	54.4	-3.0	Growing	Slower	4
New Export Orders	47.9	49.9	-2.0	Contracting	Faster	2
Imports	50.3	52.6	-2.3	Growing	Slower	3
Overall Economy				Growing	Same	18
Manufacturing Sector				Growing	Same	4

*Number of months moving in current direction. ISM® Manufacturing PMI® Report data have been seasonally adjusted for the New Orders, Production, Employment and Inventories indexes.

Demand and output still mixed amid labor reductions

Key manufacturing indicators sent both positive and negative signals as the second quarter began. The New Orders Index increased to 54.1%, up 0.6% from March, marking its fourth straight month of expansion—a positive sign for demand. In contrast, the Production Index fell by 1.7% to 53.4%, signaling a slowing output pace despite overall expansion.

The labor picture darkened further, with the Employment Index plunging 2.3% to 46.4%. This marks its 31st consecutive month of contraction. Manufacturers are increasingly relying on attrition, rather than expansion, to manage costs.

According to Spence, 60% of panelists “indicated that managing headcounts remains the norm at their companies, as opposed to hiring.” Spence added that “for every comment on hiring, there was 1.7 on reducing headcounts.” Headcount reductions were largely driven by layoffs and a refusal to backfill open positions.

Supply chains still suffering from trade friction and the Middle East war

Inflationary pressures are tightening their grip on the industrial sector. The ISM Prices Index vaulted to 84.6% in April, a 6.3% jump from the prior month. This is the highest level since April 2022. Over the last three months, the Price Index has skyrocketed by an alarming 25.6%.

Spence attributed this pricing surge to a confluence of headwinds. Rising costs are driven by “increases in steel and aluminum prices that impact the entire value chain.” Tariffs on many imported goods and increases in petroleum-based products, resulting from the Middle East conflict, also contribute. Paradoxically, some current demand is being pulled forward by these price hikes. Spence noted that customers were “ordering to get ahead of price increases.”

Trade policy remains a formidable obstacle for bottom lines. One respondent in the Chemical Products sector noted that “all imports from China are up 15% to 25%, which is impossible for us to absorb or to fully pass along.”

Uncertain outlook

The ongoing conflict in Iran casts a long shadow over the sector’s fragile recovery. It has become a dominant concern in corporate boardrooms. In this second month of the war, pessimistic sentiment heavily outweighed optimism among supply executives.

Spence reported that 69% of panelists’ comments were negative, yielding a positive-to-negative sentiment ratio of 1:2.2. Mentions of the war surfaced in 47% of all comments. Tariffs were cited in 18%.

The geopolitical strife is actively disrupting global shipping lanes and driving up energy costs. A Transportation Equipment executive noted significant supply chain risks, including increased costs and longer transit times for rerouted shipments due to conflicts in the Red Sea, the Strait of Hormuz, and the Suez Canal. An executive in the Chemical Products sector reported that products tied to crude oil and energy “have seen multiple spike increases tied to the Iran crisis and market supply inflation.”

Consequently, supply chains are grinding to a halt. The Supplier Deliveries Index rose for the fifth consecutive month to 60.6%, a 1.7% increase from March. This signals increasingly extended lead times for manufacturers.

Despite escalating obstacles, the manufacturing sector as a whole showed resilience—13 of 18 tracked industries, including leaders such as Textile Mills and Nonmetallic Mineral Products, reported growth last month.

The Chip Industry is Booming Again, But Only for Companies Building AI Infrastructure

Silicon wafer shipments jumped 13% last year, and AI data centers are taking nearly all of it.

The big picture: The unprecedented supply chain issues the technology industry has been navigating are affecting everyone and everything. According to industry trade associations, silicon wafer production is climbing again, even as demand for the consumer devices that once drove the industry cools considerably.

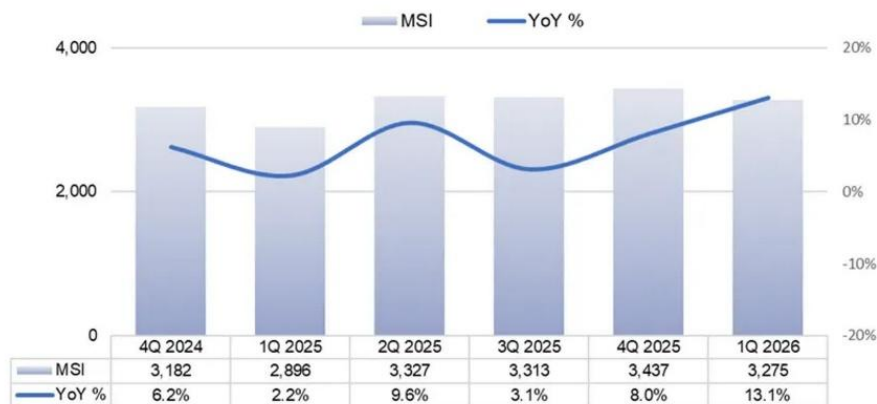
A recent report by Semi's Silicon Manufacturers Group found that the silicon wafer industry is growing once again. The quarterly analysis confirmed that global shipments for silicon wafers increased 13.1% compared to the same quarter a year earlier, rising from 2,896 million square inches (MSI) to 3,275 MSI. Shipments declined 4.7% quarter-over-quarter, which Semi characterizes as a typical outcome of industry seasonality.

Silicon wafers are the foundational substrate of modern chip manufacturing: the thin, disc-shaped platforms, measuring up to 300mm in diameter, on which CPUs, memory chips, and virtually every other semiconductor device are fabricated. Their health as a market indicator tends to telegraph broader industry direction well before finished products hit shelves.

What's driving the rebound isn't consumers. Semi SMG chairman Ginji Yada points squarely at AI and data center infrastructure as the dominant force behind sustained wafer demand, with foundries redirecting capacity toward high-bandwidth memory and computing silicon for hyperscaler customers.

PC and smartphone shipments were notably soft in the first quarter, a direct consequence of memory manufacturers reallocating capacity to service AI workloads rather than consumer-facing products.

Worldwide Silicon Wafer Shipments (MSI)
Semiconductor Applications Only



Source: SEMI (www.semi.org), April 2026

Data cited in this release encompasses polished silicon wafers, including those used as virgin test wafers, as well as epitaxial silicon wafers, and non-polished silicon wafers shipped by the wafer manufacturers to end users.



Yada also noted that AI data centers are affecting the demand for silicon wafers needed to manufacture logic (computing) devices and memory chips. Furthermore, the unusual demand spike is now extending to power management devices as well. As recent reports and industry insider sources have confirmed, chipmakers and foundry corporations are still unable to keep up with provisioning requests coming from the AI industry.

Hon Hai Profits Hit NT\$49.92bn

Hon Hai Precision Industry Co reported a stronger-than-expected increase in quarterly profit, highlighting sustained spending on hardware essential for artificial intelligence (AI).

Net profit for the first quarter of this year rose 19 percent year-on-year to NT\$49.92 billion (US\$1.58 billion), while analysts on average expected NT\$48.4 billion. Operating profit was NT\$75.6 billion, surging 63 percent from a year earlier, the company said. Earnings per share reached NT\$3.56, up from NT\$3.03 last year, while gross margin hit 6.18 percent and operating margin stood at 3.57 percent, it said.

Net profit and operating profit were record highs for the first quarter, Hon Hai rotating chief executive officer Michael Chiang told an earnings conference.

Revenue in the first quarter rose 29 percent year-on-year to NT\$2.12 trillion, the highest for the same period, company data showed.

Apple Set to Overtake Dell as MacBook Shipments Rise Against Market Decline

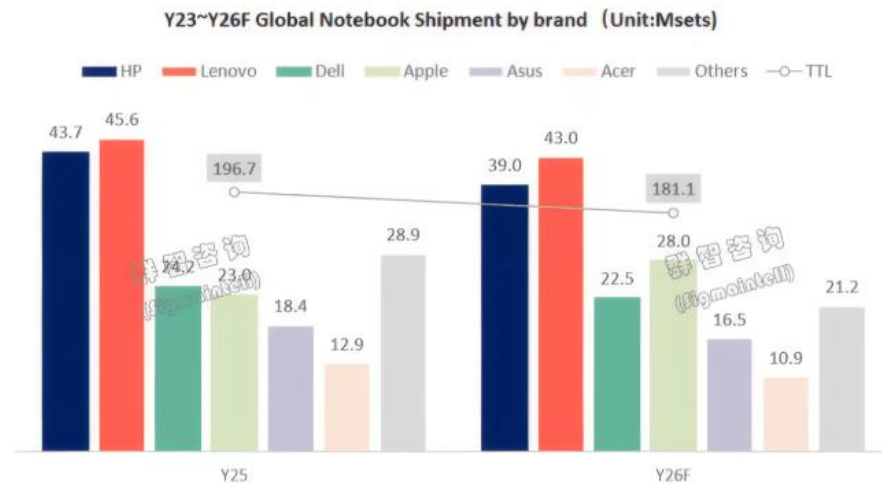
Apple's standing in the global laptop market is changing for reasons beyond simple demand. Its edge comes from how Cupertino builds its hardware, controls its supply chain, and prices devices in a volatile component market.

Market research firm Sigmaintell projects Apple will ship about 28 million MacBooks in 2026, up from roughly 23 million units in 2025. That would push the company past Dell into third place by unit volume, behind Lenovo and HP, with estimated unit volumes of 43 million and 39 million, respectively.

Total global notebook shipments are forecast to fall to 181.1 million units in 2026, an 8% year-over-year decline. Rising DRAM prices are a central factor, constraining supply and dampening demand across most OEMs. In that context, Apple is the only major manufacturer expected to grow shipments.

Apple's hardware architecture is a major driver of this momentum, alongside its pricing and supply decisions. Its unified memory architecture allows the CPU, GPU, and neural processing components to access a single shared pool of high-bandwidth memory. That design cuts unnecessary data copies, trims latency, and boosts efficiency.

It also simplifies memory sourcing, giving Apple more leverage with suppliers than rivals that depend on discrete memory configurations and third-party chips. Apple pairs this architecture with software optimizations. macOS uses memory compression to cut background RAM use, so systems can run well with less physical memory. On lower-cost models such as the MacBook Neo, the system can spill over to SSD as virtual memory, adding flexibility without significantly raising hardware costs.



Those efficiency gains matter more in a year of rising memory costs. While competitors raise prices to protect margins, Apple has largely held its prices steady. Reports suggest the company has locked in memory supply on better terms, softening the impact of those cost spikes on its lineup.

The result is a widening pricing gap in key segments. For example, lower-spec Surface models that once sat in the midrange now cost more, and top-end versions are priced above comparable MacBook builds. Apple's MacBook Air and MacBook Pro systems, by contrast, remain priced more competitively relative to their specifications.

Apple's expanding product range also plays a role. The new low-cost MacBook Neo, which could account for about 10 million units in 2026, pushes Apple deeper into the entry-level market while it continues to invest at the high end. The remaining volume is projected to come from the MacBook Air and MacBook Pro lines, which continue to serve mainstream and professional users.

A Single Micron SSD Can Now store 245TB and Use Half the Power of Hard Drives

After exiting the consumer memory business, Micron is now almost exclusively focused on serving the needs of hyperscalers and AI companies. The company's latest storage product prioritizes capacity, return on investment, and improved efficiency.

The recently introduced 6600 ION SSD is available in both U.2 and E3.L form factors and can provide up to 245 terabytes of storage in a single drive. Micron describes the new unit as the highest-capacity commercially available SSD in the industry, in line with other high-capacity drives released in the ION lineup over the past few years.

Thanks to its smaller footprint, Micron's 6600 ION drive should offer a more compact alternative to bulkier storage solutions. The US manufacturer compared the new SSD to an HDD-based setup, stating that a 245TB 6600 ION E3.L unit would require 82% less rack space to deliver an equivalent raw storage capacity using traditional hard disk drives.

The new drive is based on G9 QLC NAND flash chips, which Micron says are "at least" one generation ahead of competing enterprise QLC drives. Customers can now store and process more data in less rack space, the company added, reducing power requirements and cooling demands without sacrificing performance.

In terms of energy consumption, a 245TB Micron 6600 ION SSD requires up to 30W at peak power – about half the energy of a comparable HDD-based storage solution. As such, the new ION drives can help reduce energy consumption and carbon emissions, aligning with key priorities for modern data center operations.

In 2025, Micron announced it was exiting the consumer DRAM market by shutting down its Crucial RAM business. Like other major players in the semiconductor industry, the company – one of the "Big Three" alongside Samsung and SK Hynix – is now allocating most of its manufacturing capacity to high-performance memory products. The shift reflects growing demand for AI-focused data center infrastructure.

OpenAI Prepares AI-First Smartphone for 2028

ChatGPT creator OpenAI is working closely with Qualcomm and MediaTek to develop processors for an AI-first smartphone, which is reportedly co-designed and manufactured by China's Luxshare with a launch planned in 2028. The news comes from Ming-Chi Kuo, an analyst at China-based TF International Securities, who is known for sniffing out plans of large tech firms through supply-chain sources.

Kuo, based in Taiwan, has made accurate projections about Apple's products in the past. He claims that while OpenAI plans to mass-produce this AI smartphone by 2028, its hardware specifications will be finalized by early 2027.

Kuo also explained in his X post why AI agents will shape the OpenAI smartphone, making it work and feel very different from an iPhone. More importantly, he reckons that AI agents will replace smartphone apps, and that it's going to require both on-device edge intelligence and cloud AI integration.

Kuo also sketched out a potential revenue model in which OpenAI might tie hardware sales to subscription plans and cultivate a developer ecosystem around AI agents. He added that OpenAI's high-end smartphone is likely to entail annual shipment volumes of 300 million to 400 million units.

Last year, when OpenAI acquired Jony Ive's startup io Products for \$6.4 billion, CEO Sam Altman said the io collaboration would yield a new category of AI devices that complement phones and laptops rather than replace either. These devices, optimized for on-device AI tasks, would enable faster local inference for smaller models, improve power efficiency, and offer agent-like capabilities.

OpenAI seems to be challenging Apple's iPhone turf with a smartphone that will serve as a real-time data repository to enable continuous AI agent inference. That clearly poses a competitive threat to both Apple and Samsung, which together account for roughly 40% of global smartphone sales.

Samsung Profit Surges Over Eightfold to Beat Estimates as AI Boom Fuels Memory Chip Crunch

Samsung Electronics reported an over eightfold increase in first quarter operating profits, hitting a new record and beating analysts' estimates on the explosive growth of its chip business.

Here are Samsung's first-quarter results compared with LSEG SmartEstimate, which is weighted toward forecasts from analysts who are more consistently accurate:

- **Revenue:** 133.9 trillion Korean won (\$89.96 billion) vs. 132.69 trillion won expected
- **Operating profit:** 57.2 trillion won vs. 55.28 trillion won expected

The South Korean technology giant's quarterly profit climbed more than 750% from a year earlier to a fresh record. The company also posted record revenue, up about 70% year over year. The profits came in line with Samsung's own estimates of 57.2 trillion won and exceeded its full-year 2025 profits of 43.6 trillion won. The

earnings extend momentum from the final quarter of last year, when Samsung surpassed its prior record of 17.6 trillion won set in the third quarter of 2018.

Samsung's record earnings came on the strength of its chip business. Besides its smartphone business and semiconductor foundry services, the firm is a major producer of memory chips.

The company's chip division has emerged as a major beneficiary of the global AI data center boom, which has constrained supply and driven up prices of memory chips used in data centers and electronics such as smartphones, PCs and game consoles.

The strong quarter also comes as Samsung continues to expand its high-bandwidth memory, or HBM, business, a key component in AI data center chips.

Samsung said in an earnings report that it expects server memory demand to remain strong into the second half of the year as hyperscalers continue to accommodate AI adoption and demand for agentic AI accelerates.

Samsung's shares jumped about 1% in South Korea after the earnings release, but pared those gains in afternoon trade, ending the session 2.43% lower. Its shares are up around 90% so far this year.

Apple Is Giving up on the Vision Pro After Weak Sales and High Return Rates

Sources have informed MacRumors that Apple has ceased development of the Vision Pro after last year's upgraded model failed to lift lukewarm sales. Apple reportedly cut production dramatically soon after launching the AR headset in 2024 and sold only a few hundred thousand units in total.

The \$3,500 device was never expected to achieve mass-market success, but Apple began scaling back production even before the initial launch. Sales and interest declined within weeks, and the headset has reportedly seen a far higher return rate than any other Apple product.

Criticisms of the Vision Pro primarily center on its weight. Users reported discomfort after wearing the 1.4-pound headset for only one or two hours, and some suffered significant eye strain. Other problems include the lack of physical controls, a virtual keyboard that is too imprecise for productivity tasks, and awkward stares while wearing it in public.

However, one of the biggest issues is likely the lack of a killer app. The Apple Vision Pro offers "immersive" versions of iOS apps, 3D video clips, streaming content, and a few games, but nothing seems to have stood out as a selling point for AR.

China's First 'Pre-6G' Network Claims It's Up To 10 Times Faster Than 5G

Smartphones are an integral part of almost everyone's lives. We use them to stay in touch with one another just as much as we use them for entertainment. However, without a mobile network, a smartphone is little more than an expensive flashlight. Currently, 5G is the fastest network type that is widely available, but China is experimenting with the next iteration. And it is already a huge improvement over 5G.

Recently, China began testing what officials hope will become its first 6G network. This "pre-6G" trial network is built off the skeleton of a pre-existing 5G framework but is allegedly 10 times faster than its predecessor. The test took place in Nanjing, a major city in the Jiangsu Province, but it didn't just show off the burgeoning technology's speed — it also demonstrated features such as extremely high bandwidth, lower latency, and AI integration. It's unclear how AI was implemented in the cellular network, however.

While the test was promising, 6G networks are nowhere near ready for the general public. Engineers don't expect to finalize system specifications and capabilities until 2028 at the earliest. However, China is funding a \$485 million investment into 6G technologies and their associated applications and talent, so don't be surprised if the release build of 6G zooms past the recent pre-6G test network's speeds.

During the network test, engineers conducted verifications regarding 6G's application in numerous fields. These included low-altitude inspections, industrial manufacturing, and even holographic communications. This last one is of particular interest, as in 2024, scientists developed an antenna that used 6G signals and made holograms a hypothetically viable communication method. If you thought using apps like Zoom to video chat with coworkers was impressive, imagine talking to a small holographic projection of them. That would be every "Star Wars" fan's dream come true.

6G could also completely upend the transportation industry. Earlier this year, reports surfaced that Chinese engineers were developing a "smart surface" that could draw energy from 6G radar waves. With the power coursing through 6G signals, this technology hypothetically could give anything using this material all the fuel it could ever need. While this technology is intended for jets, imagine EVs built with the smart surface. Sure, you could probably only drive them in major cities with 6G networks, but they would never need to recharge or refuel. A small price to pay.

Google Translate uses AI to Help You Practice Pronunciation

Google is celebrating Translate's 20th birthday by launching pronunciation practice, which the company says is one of the most requested features for the product. The feature is only rolling out on Android at the moment for English, Spanish and Hindi in the US and India. If it's available for you, you'll see a button at the bottom of the app that says "Practice," which gives you the option to either "pronounce" what you've translated or to "listen" to how it's actually pronounced by native speakers.

If you choose the "pronounce" option, Translate will listen to you speak and then use artificial intelligence to analyze how you said the words to provide instance feedback. It will then show you a phonetic spelling of how specific words should be pronounced. In the example Google provided, for instance, the speaker pronounced the Spanish word for juice as "jugo" with the English "j" sound instead of with the Spanish "j" sound. So, Translate spells it out as "HU-go" in its pronunciation suggestion.

Google said around third of users on mobile use Translate to practice speaking and listening in order to be able to hold real-world conversations, making this new feature a very useful addition. The company also revealed other stats about the app. Apparently, it now supports over 250 languages, including some endangered and indigenous ones, and

Robotics to Grow Rapidly: Advantech Executive

Advantech Co expects its robotics-related business to grow rapidly this year after contributing more than 5 percent to the company's total revenue last year, the company's embedded Internet of Things president Miller Chang said in an exclusive interview with the Taipei Times.

Advantech established a dedicated robotics unit about three years ago, concentrating on providing control platforms, artificial intelligence (AI) computing systems and relevant modules for robotics applications, including robotic arms, humanoid robots, autonomous mobile robots (AMRs) and inspection robots, Chang said.

Demand for the firm's products supporting AMRs has been growing significantly since the adoption of AI technology, he added.

Advantech has received 20 new robotics-related projects so far this year, the company said.

The world's major robotic arms developers such as Japan's Fanuc Corp and Yaskawa Electric Corp, Europe's ABB Ltd and South Korea's Hyundai Motor Group are all long-term clients of Advantech, Chang said.

While humanoid robots represent the most high-profile segment with major developers in the US and China, Advantech's projects mostly remain at the proof-of-concept stage and contributed limited revenue so far, he said.

Meanwhile, demand for inspection robots and robotic dogs is also rising, particularly in North America, China and some semiconductor fabs in Taiwan, he added,

Robots require both a "brain" and a "cerebellum," Chang said.

The former handles AI decision making and high-level computing through edge AI platforms, and the latter is responsible for motion control and real-time response, he said.

Their functional operations also depend on a wide range of modules, including 2D and 3D cameras, light detection and ranging images, inertial measurement units, wireless communications modules and motion control components, he added.

Advantech previously focused on supplying core edge computing systems for robotics applications, but has increasingly integrated peripheral modules into its platforms, providing validation and compatibility support as applications diversify, Chang said.

The company has also stepped into the drone-related business, focusing on compact, low-power embedded modules, he said. During the interview, Chang also said that Advantech completed the construction of a warehouse at its new Southern California site in December last year. It is looking to launch a new office building, which will serve as its US headquarters when completed in June. The new site is to handle higher-value, high-performance edge computing applications, including semiconductor equipment, medical devices, defense and networking systems, Chang said. The company's existing operations in Milpitas, California, would continue to focus on general industrial and embedded computing assembly, he said.

A Chinese Court Ruled Companies Can't Fire Workers Simply Because AI Can Replace Them

A court in China has reached a ruling that would likely be welcomed by many people in the rest of the world: that companies cannot legally lay off workers or even cut their salaries just because an AI can replace them.

We see a lot of stories about US tech giants laying off employees because AI systems are replacing them. As was the case with Meta, Amazon, and Block, these cuts are usually framed as ways to streamline businesses and embrace new technologies – even when they're not – which tends to give the firms' share prices a boost.

However, the Hangzhou Intermediate People's Court has ruled that a company illegally fired a worker after he refused to take a demotion after an AI took his job.

The worker, identified only as Zhou, was hired in November 2022 as a quality assurance supervisor with a monthly compensation of 25,000 yuan (\$3,655). Somewhat ironically, his job was to monitor output by AI models to identify and filter any illegal and copyright-infringing material.

But Zhou's position was eventually automated by an AI system. His company therefore decided to demote him to a lower-level position with a reduced wage of 15,000 yuan (\$2,193).

Zhou understandably refused to change jobs, so he was fired – a decision blamed on organizational restructuring and reduced staffing needs. He was offered 311,695 yuan (\$45,650) in severance pay.

Zhou refused to accept the deal and took his former employer to an arbitration panel, which ruled his dismissal unlawful. The company then sued in district court and appealed to the Hangzhou Intermediate People's Court. Both courts found that AI was not a legal excuse to get rid of staff.

This doesn't mean Chinese companies can never restructure around AI. But employers must negotiate, train workers, and make reasonable reassignment offers instead of simply pointing to a chatbot and heading straight for layoffs.

The ruling echoes a December case in Beijing involving a map data collector whose job was automated. That court also found that AI adoption was a business choice, not a natural disaster or sudden policy change.

Whether courts elsewhere in the world follow China's line remains to be seen. But the message to AI-happy employers in the country is clear: new technology is no magic "fire everyone with no consequences" card.

3 Companies You Might Not Realize Are Owned by Foxconn

You may not have heard of them, but odds are, you have at least one Foxconn-produced electronic device in your home. The Taiwanese manufacturer makes numerous consumer electronics, including iPhones, Google Pixel devices, Kindles, and gaming consoles for Nintendo, Sony, and Microsoft.

Foxconn, notorious for its secretive factories and tough working conditions, has benefited greatly from the rise of artificial intelligence. Once reliant on Apple, AI has allowed Foxconn to diversify. In 2024, Foxconn claimed to make around half of all servers used for AI, and in March 2026, it reported a 46% sales increase compared to the previous March. The company has also partnered with NVIDIA to build data centers, including supercomputer infrastructure to support AI for use by Taiwanese researchers and businesses.

Just as Foxconn's partners and their products include household names, so too do its subsidiaries. The massive manufacturer has acquired some well-known companies in the electronics world whose products range from TVs to educational tools.

Sharp

Sharp is a big name in consumer electronics, with over 100 years of history. After starting out making belt buckles and pencils, the company is now known for making TVs, home appliances, and more. Since 2016, Foxconn has owned a 66% share of Sharp, giving it a majority stake and controlling ownership of the Japanese electronics company. Foxconn hoped to combine its manufacturing and distribution capabilities with Sharp's brand name, making a deal they said was worth 389 billion yen, or around \$3.5 billion (U.S.).

At the time, Foxconn executives Terry Gou and J.W. Tai said they were committed to turning around Sharp's financial struggles by investing in research and product development. Their goal was to return the company to its former status as a leader in the consumer electronics field while addressing profitability in the near term. But while early post-acquisition profits were promising, competition from Chinese manufacturers has pushed Sharp out of the TV display production market. In February 2026, Foxconn backed out of a deal to buy a Sharp LCD display plant in Japan, though Sharp president and CEO Masahiro Okitsu has said the companies' relationship is still as strong as ever.

Belkin

Another big name in consumer electronics, Belkin is known for its computer and mobile phone accessories like chargers, USB hubs, and cases. The company was founded in 1983 by Chet Pipkin, who remained CEO until 2021. Pipkin stayed on through the 2018 Foxconn acquisition, which saw the Taiwanese corporation purchase Belkin for \$866 million. At the time, Foxconn hoped the deal would help it branch out into the market for smart home devices, leveraging the inroads Belkin had already made with its consumer devices.

In acquiring Belkin, Foxconn also purchased its subsidiaries. Those include Linksys, acquired by Belkin from Cisco in 2013 for an undisclosed amount. The networking hardware company makes products like mesh Wi-Fi systems that some say are better than regular routers.

Foxconn's ownership of Linksys has opened up the American-founded company (now headquartered in the U.K.) to scrutiny from the U.S. government. In March 2026, the Federal Trade Commission (FTC) banned the sale of new routers made in foreign countries, impacting major players in the industry. While the government has granted an exception to Netgear, an American company, it seems unlikely the same will happen for Linksys, given who its parent company is and where they're based.

SMART Technologies

Canadian company SMART Technologies is best known for making interactive whiteboards that are used in schools, businesses, and even government agencies. It was founded in 1987 by David Martin and Nancy Knowlton, a married couple who ran the company until 2012 and left the board in 2014. In 2016, SMART Technologies was acquired by Foxconn for \$200 million, which executives hoped at the time would pave the way for new growth and make the company more stable in the long run.

Following the acquisition, SMART Technologies has remained headquartered in Calgary and employs over 600 people in 27 countries. The company continues to make new interactive whiteboards and other educational products, including a cloud-based platform for teachers and students called Lumio. Last year, Lumio added AI tools that allow teachers to quickly generate quizzes, including game-based ones, and lesson plans, implementing new features based on educator feedback. While they do seem a natural fit for a company that's always been focused on applying technological advances to the classroom, SMART Technology's recent focus on AI aligns with Foxconn's extensive work in that field.



Report No: M-700-26
March 2026

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%
Total	\$86,477.7	\$99,164.6	14.7%

\$ 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%
Total	\$99,164.6	\$XX,XXX.X	X.X%	X.X%	Y.Y%	Z.Z%

\$ 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%
Total	\$86,477.7	\$99,164.6	14.7%	9.6%	6.7%	4.9%

\$ Millions

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World Connector Market Handbook

End-Use Equipment Sectors

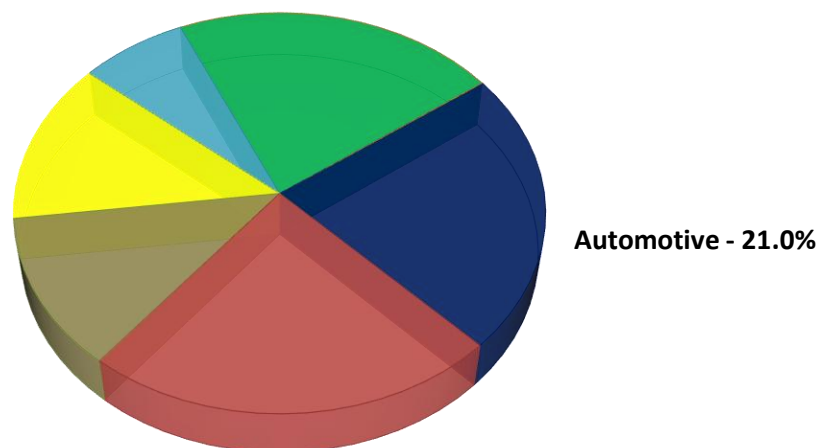
Telecom/datacom was the largest end-use equipment sector for electronic connector products with 2025 shipments of \$2X,XX0.7 million. Telecom/datacom was followed by automotive, where 2025 sales grew X.X% to \$2X,XXX.6 million. It is anticipated in 2026 that telecom/datacom will remain the largest end-use 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%
Total	\$99,164.6	\$X,XXX.X	Y.Y%

\$ Millions

World Connector Market - Top Five Equipment Sectors – 2025



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