

15 Continuous Months of Double-Digit Sales Growth

Regional Performance:

Year-to-date, sales for June are positive in all regions. The greatest growth, as was seen in the last six months, is in the Asia Pacific region. Although still positive, the weakest growth was once again seen in the Japanese region. From a booking perspective, all regions except the ROW region showed positive year-over-year double-digit growth, with the greatest growth in North America. Sequentially, all regions but North America had negative growth, with China registering the greatest decline. See page 5.

2026 Currency Impact:

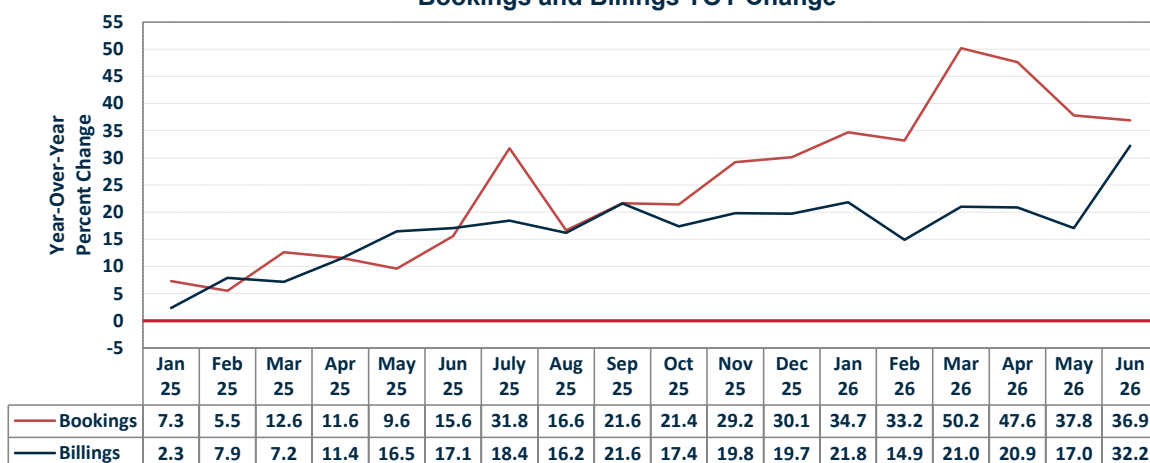
The industry registered a YOY increase in sales in June 2026, of +32.2 in USD and +34.8% in local currency.

**NEW BISHOP
RESEARCH REPORT**

**Analysis of
the European
Connector Market**

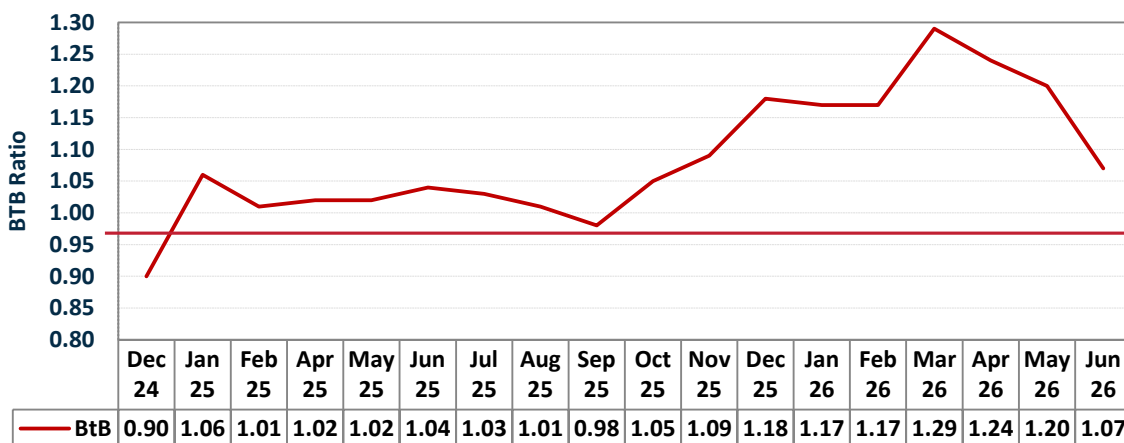
June bookings increased by +36.9%, while billings increased by +32.2%.

Bookings and Billings YOY Change



The book-to-bill ratio in June was 1.07, down from 1.20 in May. This is the 19th time in the last 21 months that the book-to-bill was over 1.00.

Connector Industry Book-to-Bill

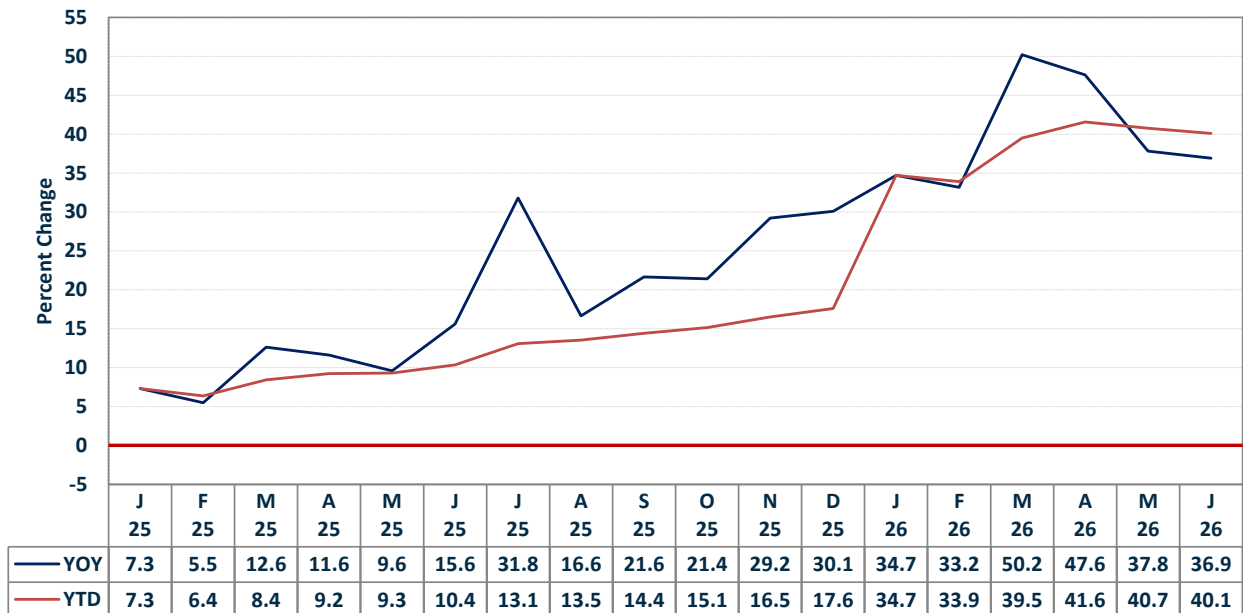


Booking Highlights and Conclusions

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%	5.8%	8.3%	7.3%	34.7%	8.3%	7.3%	34.7%
Feb	5.2%	5.6%	4.4%	6.8%	5.5%	33.2%	7.5%	6.4%	33.9%
Mar	-2.9%	2.2%	15.2%	-1.4%	12.6%	50.2%	4.4%	8.4%	39.5%
Apr	3.2%	-0.8%	-2.5%	10.2%	11.6%	47.6%	5.8%	9.2%	41.6%
May	9.1%	11.9%	4.5%	5.8%	9.6%	37.8%	5.8%	9.3%	40.7%
Jun	-6.8%	-5.2%	-5.9%	11.3%	15.6%	36.9%	6.7%	10.4%	40.1%
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



- June bookings increased +36.9% year-over-year.
- Orders decreased -5.9% on a sequential basis in June.
- The book-to-bill ratio for June was 1.07, down from 1.20 in May.

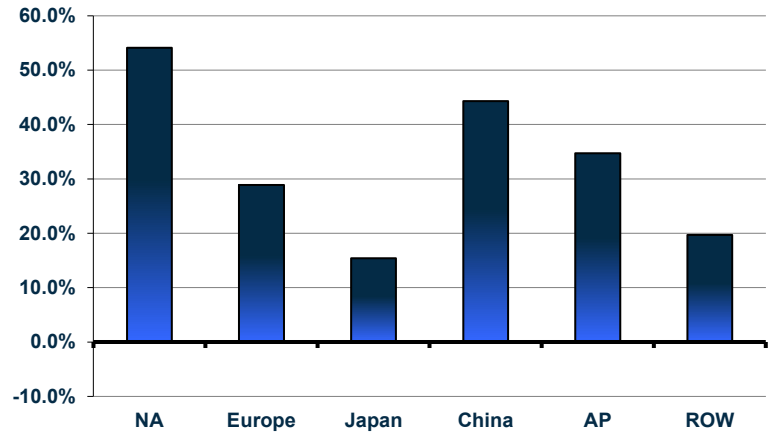
Regional Performance: BOOKINGS

June 2026 Bookings

Region	Sequential	YOY	YTD
NA	8.2%	56.2%	54.1%
Europe	-3.3%	24.0%	28.9%
Japan	-0.9%	6.3%	15.4%
China	-22.2%	42.3%	44.3%
AP	-9.9%	25.0%	34.7%
ROW	-11.1%	10.7%	19.7%
Total	-5.9%	36.9%	40.1%

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Year-To-Date Bookings by Region



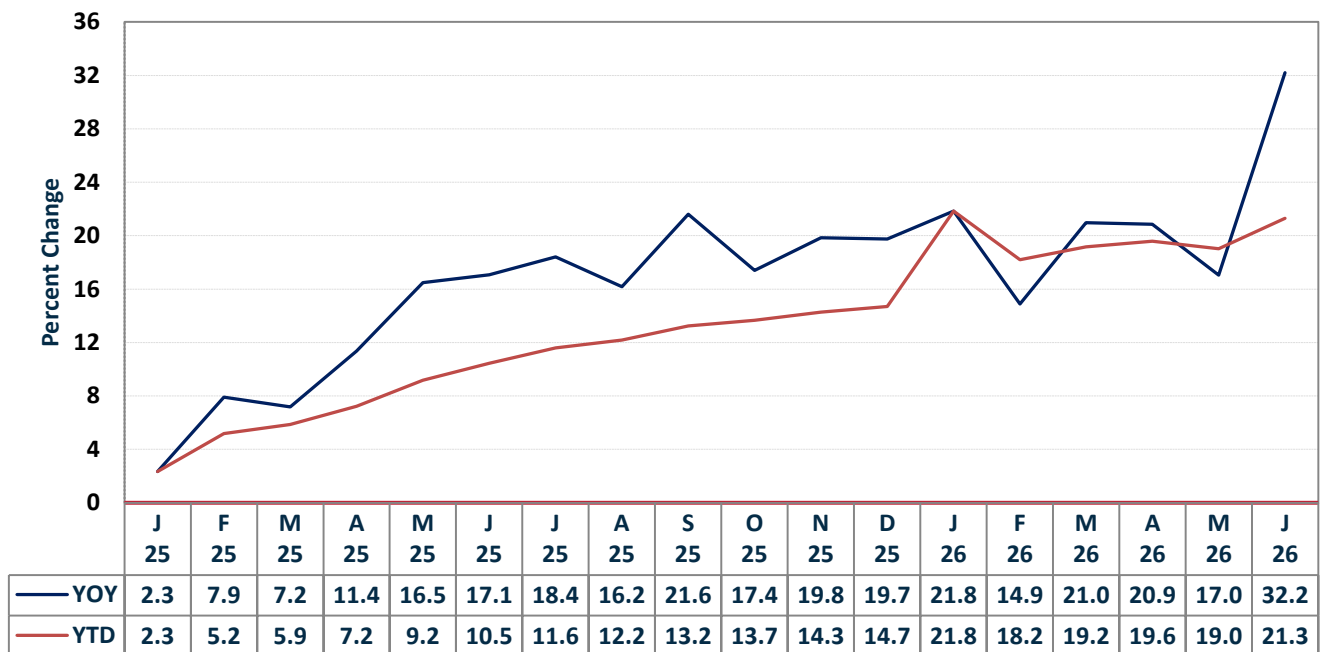
- Year-to-date, June bookings increased +40.1%, with the greatest growth in the North American region, where bookings increased +54.1%, followed by China with growth of +44.3% and the Asia Pacific region where bookings increased +34.7%. The lowest growth was seen in the Japanese region, where year-to-date bookings increased +15.4%. These results were very similar to May's results, with the regions growing in a like manner.
- From a year-over-year perspective, total world sales grew +36.9, down from 37.8% in May, with the greatest growth in the North American region, at +56.2%, followed by the Chinese region, where year-over-year bookings increased +42.3%. Like YTD, the least growth was seen in Japan, where year-over-year sales increased +6.3%.
- Sequentially, sales grew in only one of the six regions, North American, where sales grew +8.2% sequentially. All other regions saw a decrease in sequential growth, with the greatest decline in China at -22.2%, followed by the ROW region where sequential sales decreased -11.1%. Because five of the six regions experienced negative growth sequentially, total world growth was also negative, recording a decline of -5.9%.
- Year-over-year total world order growth has now been positive for 27 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%	18.2%
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%	8.1%	2.8%	16.5%	17.0%	2.7%	9.2%	19.0%
Jun	-4.9%	-6.9%	5.1%	3.3%	17.1%	32.2%	2.8%	10.5%	21.3%
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



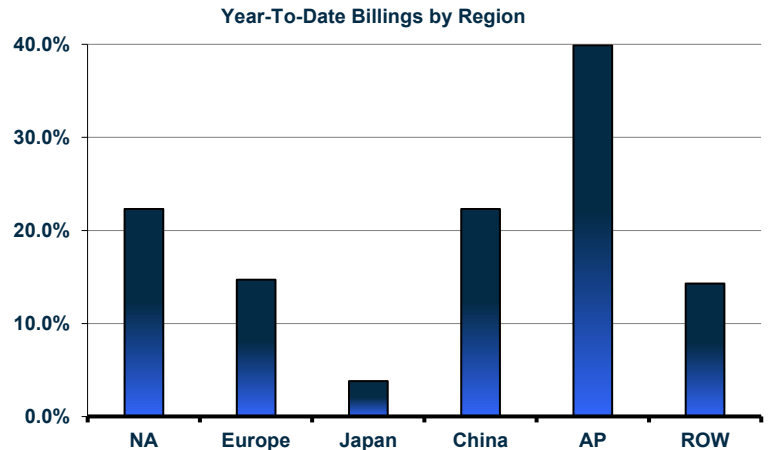
- June billings grew +32.2% year-over year and +21.3% year-to-date.
- Sequentially, June billings increased +5.1%.
- Year-over-year sales growth has now been positive for 27 consecutive months and year-to-date for 30 consecutive months.

Regional Performance: BILLINGS

June 2026 Billings

Region	Sequential	YOY	YTD
NA	14.3%	39.6%	22.3%
Europe	-1.8%	20.2%	14.7%
Japan	0.3%	3.2%	3.8%
China	0.9%	34.0%	22.3%
AP	8.9%	48.4%	39.9%
ROW	-9.8%	19.0%	14.3%
Total	5.1%	32.2%	21.3%

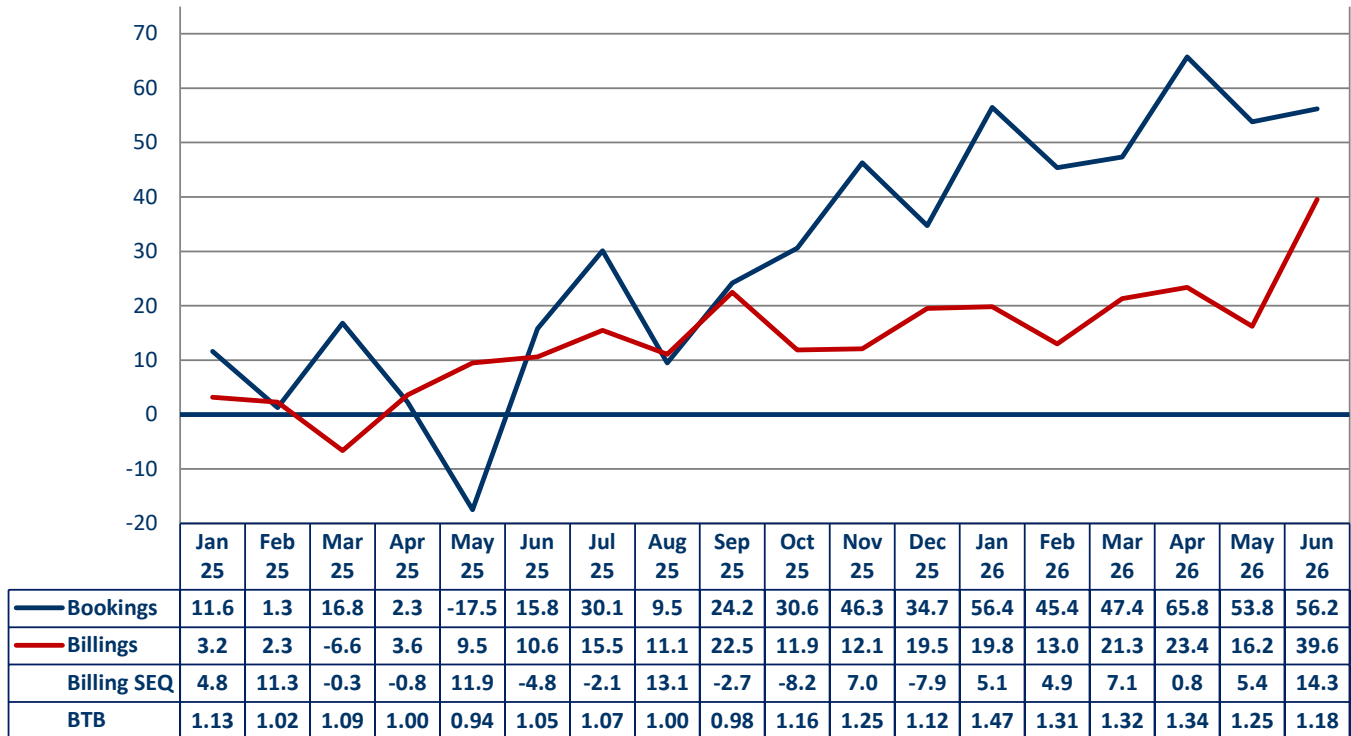
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- June connector sales increased by +32.2% compared to the same period last year, and +21.3% year-to-date.
- Sequentially, four of the six regions showed an increase, with the greatest increase in North American region, at +14.3%, followed by the Asia Pacific region, where sequential sales increased +8.9%. The two regions showing a decline were Europe and the ROW region, where sales declined -1.8% and -9.8% respectively.
- Year-over-year, all six regions saw an increase, with the greatest increase, in the Asia Pacific region where sales increased +48.4%, followed by the North American region, where sales increased +39.6% and the Chinese region where sales increased +34.0%.

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.

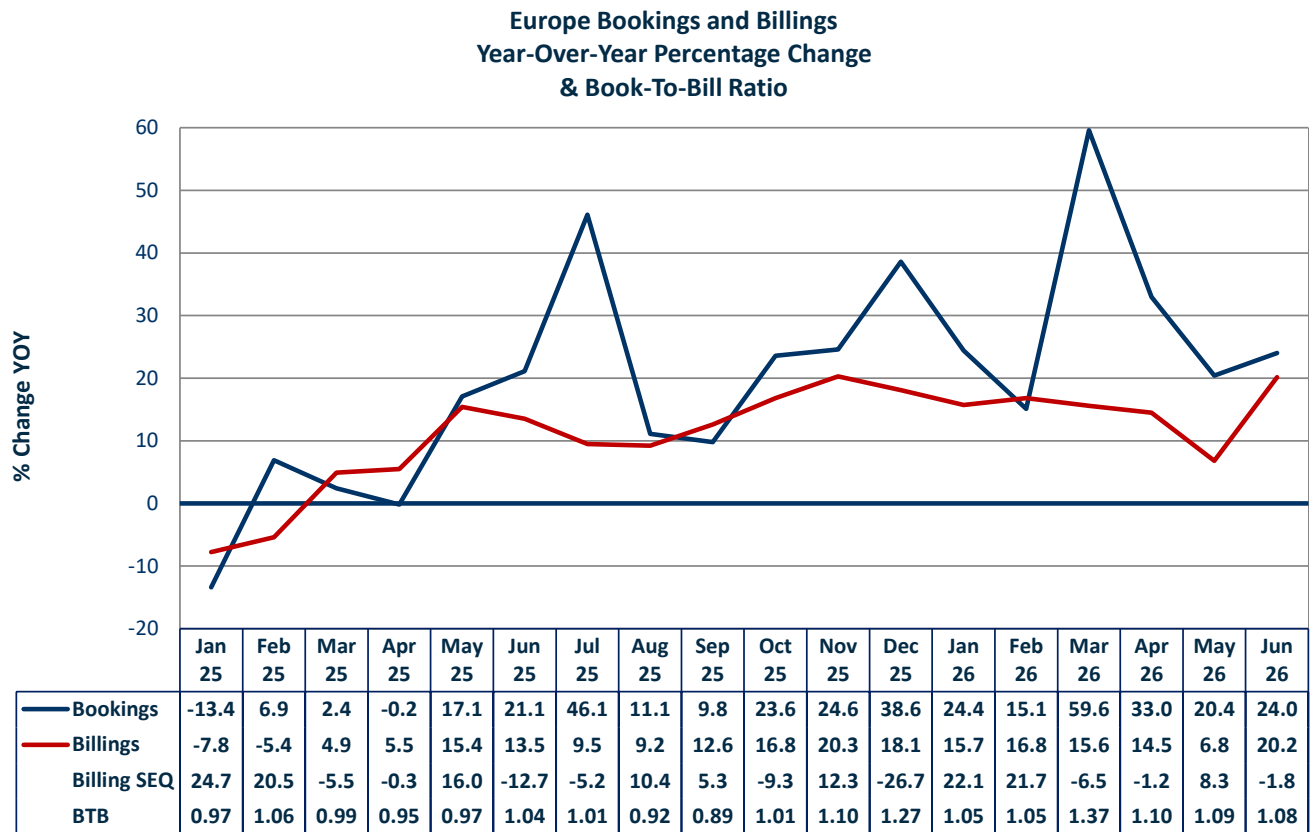
**North America Bookings and Billings
Year-Over-Year Percentage Change
& Book-To-Bill Ratio**



North America Performance

- Sales increased +39.6% year-over-year in June, while orders increased +56.2%, up from +53.8% in May. Sequentially, North American billings increased +14.3%, up from +5.4% in May. The book-to-bill ratio decreased to 1.18, down from May's 1.25.
- The US unemployment rate dropped slightly to 4.2% in June, from May's high of 4.3%, this was driven by a contraction in the labor force rather than robust job growth. At the same time, the Consumer Price Index for All Urban Consumers decreased by -0.4%, seasonally adjusted in June 2026 and rose 3.5% over the 12 months, according to the U.S. Bureau of Labor Statistics.
- Despite persistent economic headwinds, the U.S. new-vehicle market delivered a stronger-than-expected result in June. According to preliminary estimates, June sales likely reached 1.36 million units, up 7.2% year over year and above forecasts of 16.1 million, according to Cox Automotive.
- With the second straight month of 10% jumps, consumer sentiment climbed to its highest reading since February of this year on the basis of easing price pressures at the pump in recent weeks. All five index components improved, led by significant 20% increases in buying conditions for durables as well as year-ahead business conditions according to the University of Michigan's Survey's of Consumers in June.

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.



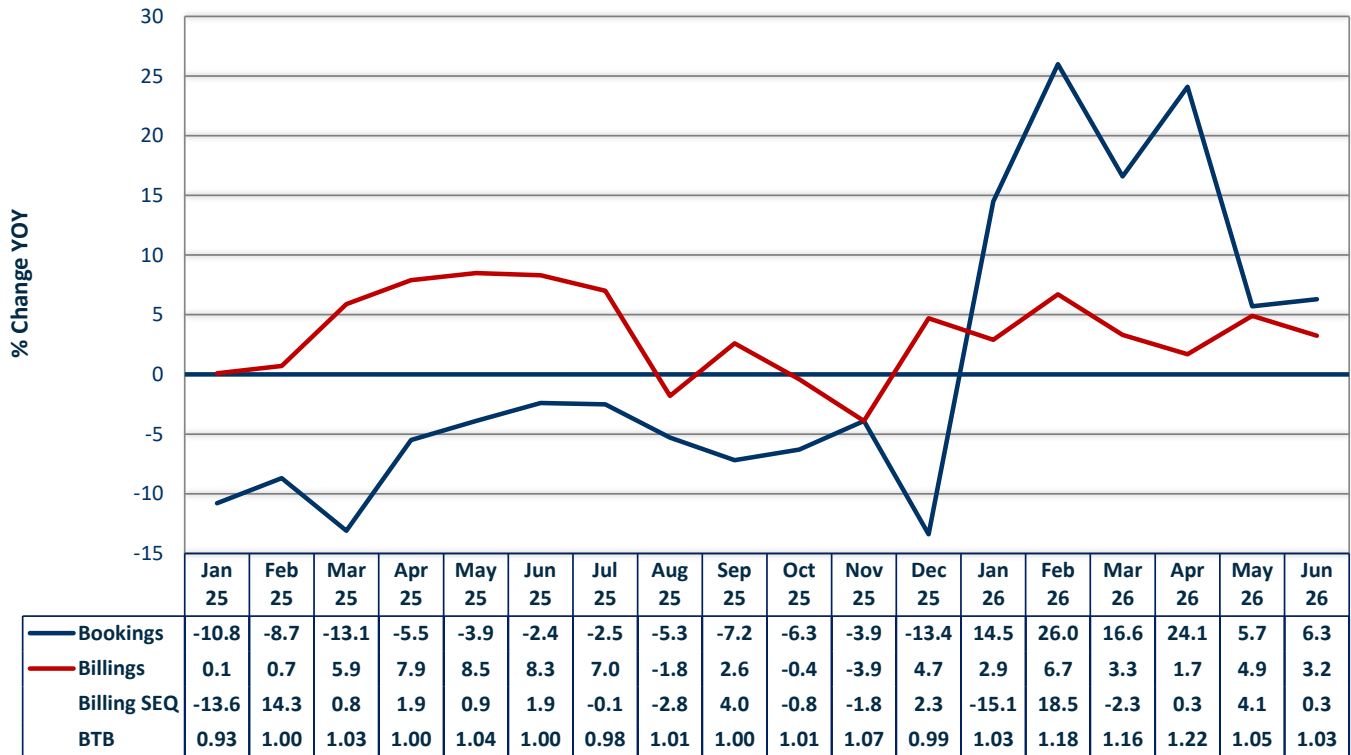
Europe Performance

- Bookings increased by +24.0% in June, up from +20.4 in May. Billings increased by +20.2%, up from +6.8% in May. Sequentially, sales decreased by -1.8%, down from +8.3% in May. The book-to-bill ratio was 1.08 down from 1.09 in May.
- "New EU car registrations increased by 13.6% year-on-year in June 2026 to reach 1,147,962 units, driven by strong growth in major markets and surging demand for electrified vehicles", according to the European Automobile Manufacturers' Association. "Up until June 2026, battery-electric cars held a 20.7% share of the EU market, up from 15.6% a year earlier and Hybrid-electric car registrations captured 37.3% of the market."
- "In May* 2026, the euro area seasonally adjusted unemployment rate was 6.2%, stable compared with April 2026 and down from 6.3% in May 2025. The EU unemployment rate was 5.9% in May* 2026, also stable compared with April 2026 and down from 6.0% in May 2025", according to Eurostat.
- The Eurozone Economic Sentiment Indicator rose for a second consecutive month to 95.0 in June 2026, moving further from April's five-year low and surpassing market expectations of 94.3, as businesses and consumers continued to evaluate the economic impact of the Iran war amid ongoing US-Iran peace negotiations, according to Trading Economics.

**June 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**

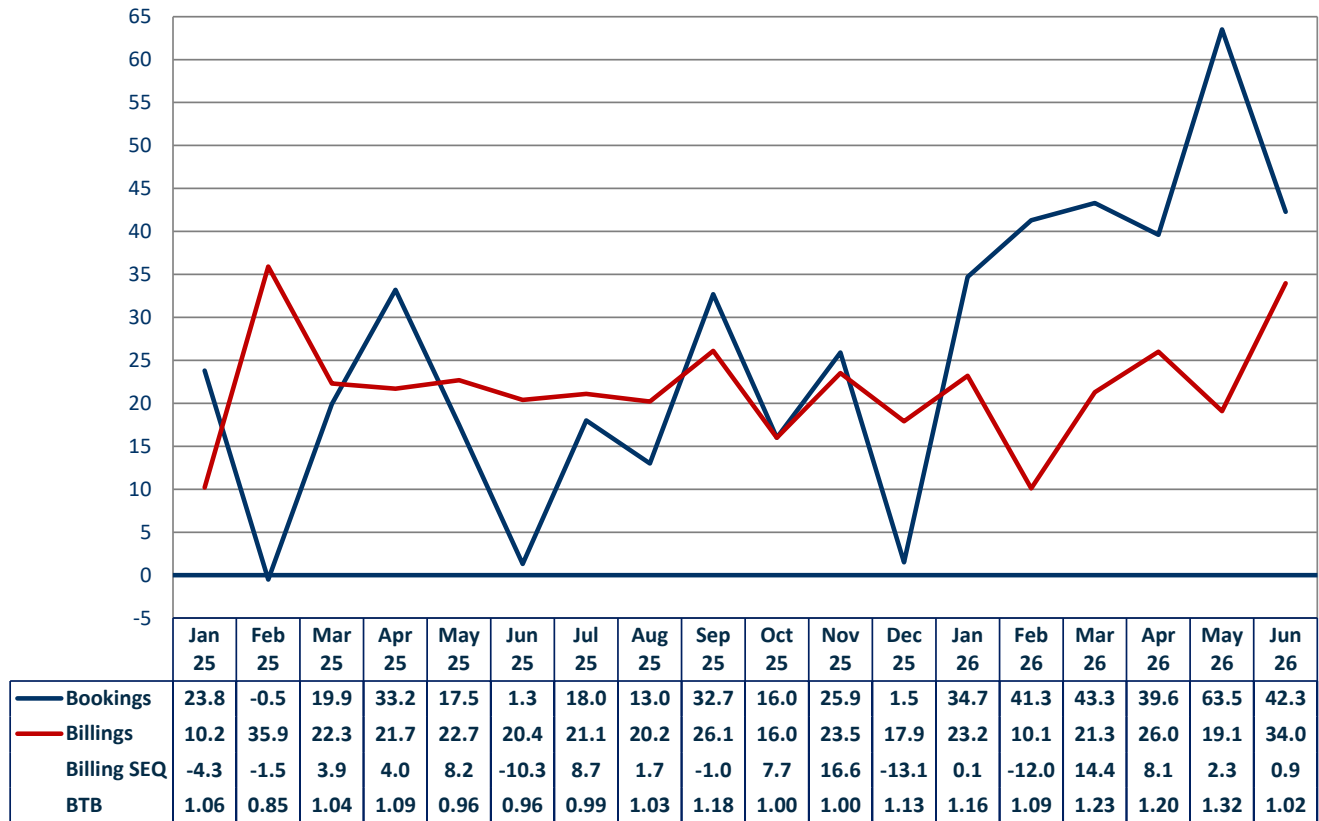


Japan Performance

- June's year-over-year bookings increased +6.3%, up from +5.7% in May, while billings increased +3.2%, down from +4.9% in May. Sequentially, sales increased +0.3%, down from +4.1% in May. Japan's book-to-bill ratio decreased to 1.03, from 1.05 in May.
- "Core consumer prices in Tokyo's central wards rose 1.6% YoY in June 2026, accelerating from 1.3% in the previous month in line with market expectations. It was the first acceleration since September last year and marked the fastest increase in three months", according to Trading Economics. Also, "Japan's S&P Global Composite PMI rose to a five-month high of 53.1 in July 2026, up from 52.8 in June, driven by steady improvements in both the manufacturing and service sectors".
- Japan's domestic new vehicle market expanded by 8.6% year-on-year to 426,883 units in June 2026, following a 5% rise to 393,162 units a year earlier, according to registration data released by the Japan Automobile Manufacturers Association (JAMA). Sales of passenger vehicles rose by 9.5% to 360,452 units, while truck sales increased by 3.1% to 65,323 units. according to Just Auto.
- "Japan's exports surged 19.3% year-on-year to a three-month high of JPY 10,929.0 billion in June 2026, accelerating from a marginally revised 16.8% increase in the prior month and marking the strongest growth since November 2022. It was also the tenth straight month of export growth", according to Trading Economics.

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**

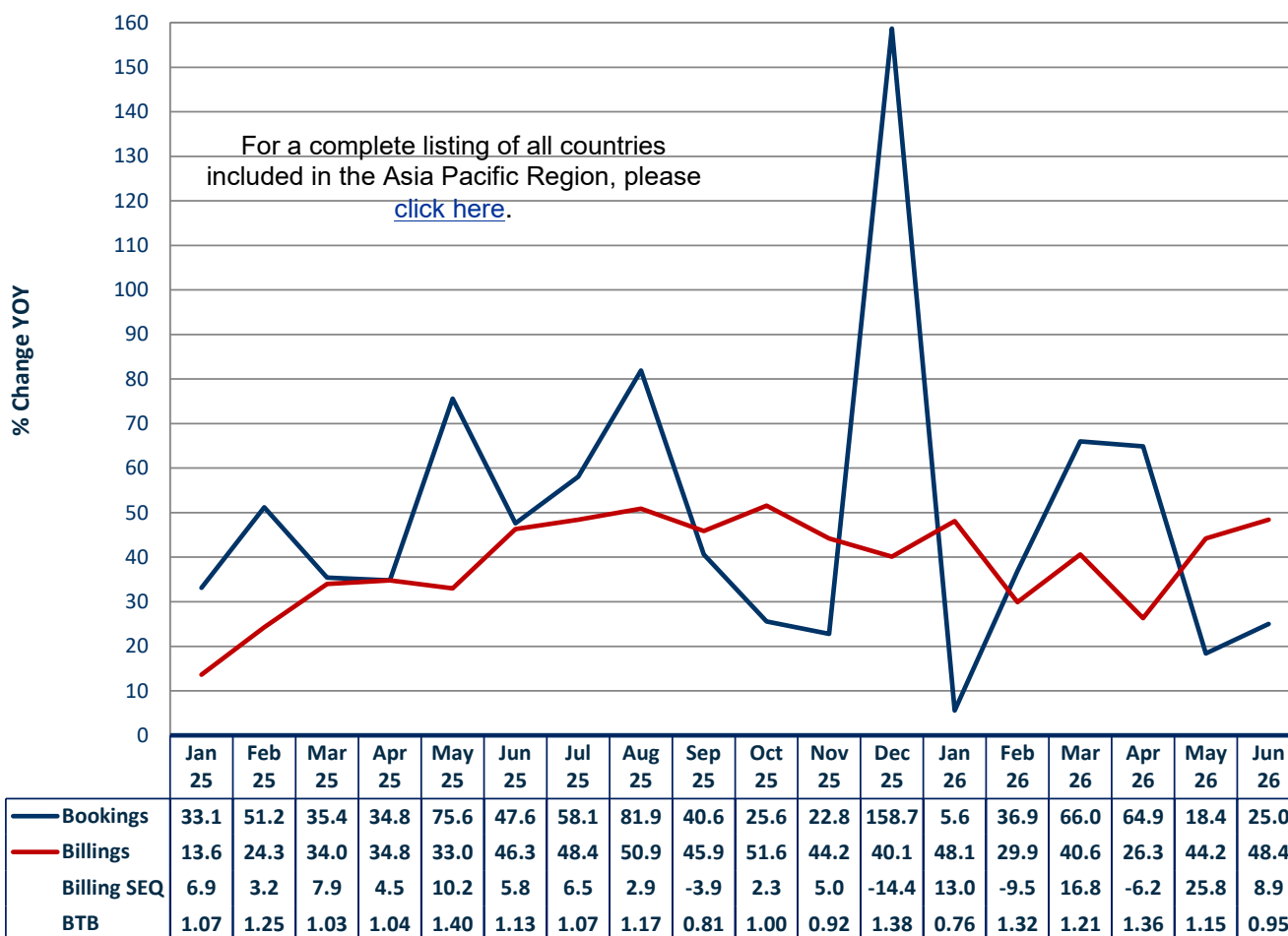


China Performance

- China's June sales grew +34.0% on a year-over-year basis. Bookings increased by +42.3% in June, while sequentially, sales increased by +0.9%. The book-to-bill decreased to 1.02, down from 1.32 in May.
- In June 2026, China's "consumer price rose 1% in June from a year ago, missing economists' estimates of 1.1% growth, and slowing from 1.2% in May. Core CPI, excluding volatile food and energy prices, also rose 1% in June from a year earlier, edging down from the 1.1% increase in May. Food prices declined 1.6% from a year earlier, easing from a fall of 1.7% in May, according to CNBC.
- "Sales of Chinese-made vehicles, including exports, declined by 3.2% to 2.81 million units in June 2026 after rising by 14% to 2.904 million units a year earlier, according to passenger car and commercial vehicle wholesale data compiled by the China Association of Automobile Manufacturers (CAAM)".
- In June, the purchasing managers' index (PMI) of China's manufacturing industry was 50.3%, an increase of 0.3 percentage points from the previous month and back to the expansionary rangeNational Bureau of Statistics of China
- "China's surveyed urban unemployment rate stood at 5.0% in June 2026, down from 5.1% in May, and in line with market expectations", 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.

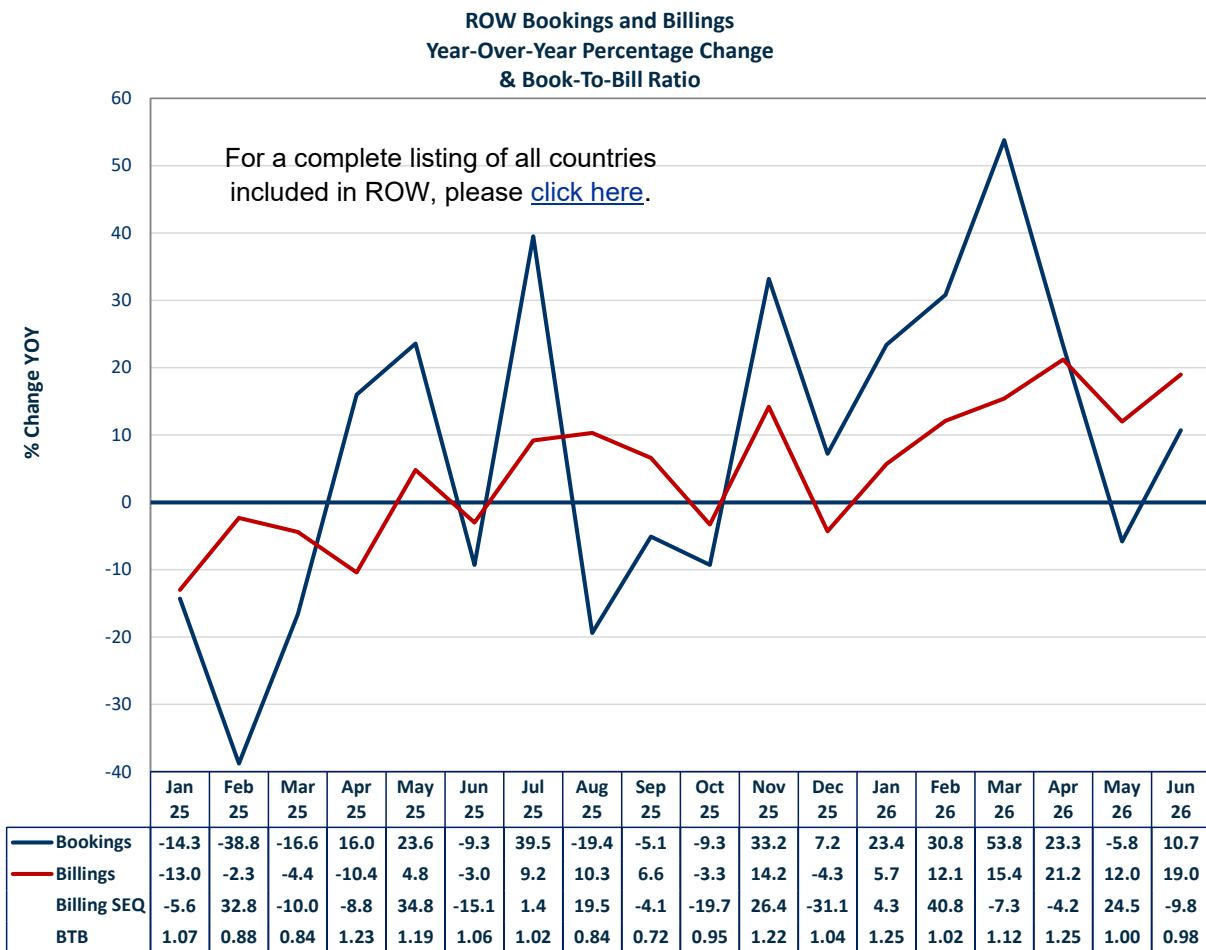
**Asia Pacific Bookings and Billings
Year-Over-Year Percentage Change
& Book-To-Bill Ratio**



Asia Pacific Performance

- Year over year, June orders were up +25.0%, up from May's +18.4% increase. Billings increased by +48.4%, up from +44.2% in May. Sequentially, sales increased by +8.9%, down from +25.8% in May. The book-to-bill ratio decreased to 0.95 in June after increasing to 1.15 in May, first BTB below one since Jan.
- "India's wholesale price inflation neared a double-digit rise at 9.87% year-on-year in June, driven by higher food prices even as energy costs eased, government data showed. The rate of wholesale price increase was higher than the 9.68% rise a month ago and economists' projection of 9.15%, according to Reuters. "India's HSBC Manufacturing PMI fell to 53.9 in July 2026 from 54.2 in June, signaling a slower, below-trend improvement in factory conditions, preliminary estimates showed," according to Trading Economist.
- South Korea's exports in June surged by 70.9% year-on-year to a record high \$102.25 billion, crossing the \$100 billion threshold in a single month for the first time, becoming the fourth country globally to accomplish this.

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 +10.7% in June, after declining -5.8% in May. Although, not as strong as growth in the previous months, it was nice to see the region back in positive territory. Billings increased by +19.0% year-over-year, up from +12.0% in May. Sequentially, sales decreased by -9.8%, after climbing to +24.5% in May. The book-to-bill ratio was 0.98 down from 1.00 in May.
- "Brazil's annual inflation rate eased to 4.64% in June 2026, from 4.72% in May, below market expectations of 4.80%. Energy and fuel inflation remained elevated at 7.71%, reflecting supply disruptions linked to the closure of the Strait of Hormuz during the US-Iran conflict, although it eased from 8.90% in May as geopolitical tensions showed signs of moderating. On a monthly basis, consumer prices rose 0.16%, following a 0.58% increase in May," according to Trading Economics.
- "South Africa's seasonally adjusted Absa Purchasing Managers' Index (PMI) dropped to 47.3 in June 2026 from 50.8 in the prior month, signaling renewed contraction in factory activity after two consecutive months of growth. This mainly reflected weaker demand, which weighed on new orders. Nevertheless, confidence about future business conditions improved strongly amid lower oil prices," 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	2.1% Steady	0.6% Up	2.1% Steady	4.7% Steady	N/A	N/A
Industrial Production Growth	1.1% Steady	-0.2% Down	3.7% Up	5.3% Up	N/A	N/A
Manufacturing PMI*	53.9 Steady	51.4 Down	54.8 Up	50.3 Up	N/A	N/A
Inflation Rate	3.5% Down	2.8% Down	1.7% Up	1.0% Down	N/A	N/A
Unemployment Rate	4.2% Steady	6.0% Steady	2.% Down	5.0% Down	N/A	N/A
Retail Sales Growth YOY	6.7% Steady	1.9% Up	1.9% Steady	1.0% Up	N/A	N/A
June Connector Sales	39.6%	20.2%	3.2%	34.0%	48.4%	19.0%
YTD Connector Sales	22.3%	14.7%	3.8%	22.3%	39.9%	14.3%
June Connector Orders	56.2%	24.0%	6.3%	42.3%	25.0%	10.7%
YTD Connector Orders	54.1%	28.9%	15.4%	44.3%	34.7%	19.7%

* Purchasing Manager Index - Below 50 is contracting factory activity

Key Take Aways:

- In June, once again, YTD bookings were up in all regions in the double-digit range, with the greatest growth in North America at +54.1%, followed by China with YTD growth of +44.3%. Looking at billings from a year-over-year view, all regions showed growth, with all but Japan exhibiting double-digit growth. Similar results were seen in year-to-date sales, with all regions except Japan, showing double-digit growth.
- After rising in three of the four regions last month, inflation was down in three of the four months in June, with Japan, the only region showing an increase. Although from an overall view, unemployment in North America was down slightly, coming in at 4.2%, it was still high in Canada at 6.5%. Unemployment was also down slightly in Japan and China, and remaining fairly steady in Europe.

The Industry Backlog Is 14.7 Weeks

June 2026 was another great month for the connector industry. Orders totaled \$11,843 million, up +36.9% over the same period in 2025. Sales were \$10,656 million, up +32.2%.

The industry shipped \$2,337 million per week in June. Assuming the same weekly shipments, the industry has 14.7 weeks of backlog (ending backlog \$34,344 million divided by \$2,337 million).

Industry Backlog

	Full Year 2025	June 2026
BtB Ratio	1.00	1.07
Beginning Backlog	\$21,287	\$24,067
YTD Bookings	\$101,868	\$66,900
YTD Billings	\$99,165	\$56,623
Ending Backlog	\$24,067	\$34,344
Backlog in Weeks	12.6	14.7

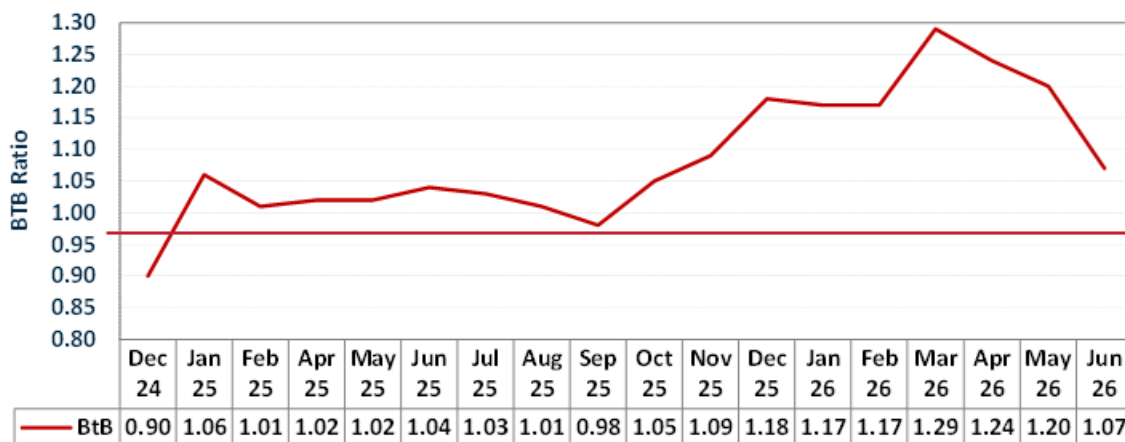
\$ Millions

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Connector demand continues to be very strong year-over-year. This marks 13 months in a row when orders achieved double-digit growth. Connector backlog is up \$10.3 billion since the end of 2025.

The following chart shows 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.

Connector Industry Book-to-Bill



Connector Sales & Order Trends

Connector orders have exhibited a double-digit increase for 13 consecutive months. Sales have shown a double-digit increase for the last 15 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	37.8%	17.0%
June	36.9%	23.3%
July		
August		
September		
October		
November		
December		
Year-to-Date	40.6%	21.2%

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 27 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 +40.6% through June 2026. This sets a record for the connector industry.

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 June 2025 versus June 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	0.8682	0.8688	-0.1%
Yuan	7.1826	6.7755	6.0%
Yen	144.5751	160.7391	-10.1%

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

Industry Sales Performance June 2026 USD-vs-Local Currencies

Region	U.S.\$	Local Currency
North America	39.6%	39.6%
Europe	20.2%	24.5%
Japan	3.2%	-5.5%
China	34.0%	42.2%
Asia Pacific	48.4%	48.4%
ROW	19.0%	19.0%
World	32.2%	34.8%

Connector sales in June of 2026 increased +34.8% when measured in local currencies, versus an increase of +32.2% in US dollars.

2026 Outlook: Historical Analysis

We believe a reasonable approach to forecasting is to evaluate how the industry has performed in past years. There are several ways we can do this. For example, we have now reached the halfway point in 2026. The industry has shipped \$56,623 million through June. Assuming the industry performed as well in the second half, sales would be \$113,246 million, up +14.3% over 2025.

We could also look at sales over the past 15 years. Taking this approach, we see that June year-to-date sales averaged 48.9% of full-year sales. Assuming history repeats itself and we utilize this method; 2026 sales would be \$115,793 million or growth of +16.9% over 2025.

One additional approach would be to average the percentage of growth in a particular month, like June, represented over a particular period. Looking at the average percentage growth over the last four Junes (2022, 2023, 2024, and 2025), we calculate that sales averaged 8.125% of full year sales. Once again, assuming history repeats itself, employing this method would result in sales of \$130,588 million or growth of +31.8%.

Historical Forecast Analysis

Methodology	2025 Sales	2026 Sales	Percent Growth
June YTD Sales X2	\$99,088	\$113,246	14.3%
15 Year 48.9%	\$99,088	\$115,793	16.9%
Last 4 Junes	\$99,088	\$130,588	31.8%

\$ Millions

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All these methods are worth exploring, and only after 2026 is over will we be able to state with certainty which approach was best. Currently sales are up +21.3% and order demand is very robust, with double-digit year-over-year growth in bookings for 15 of the last 16 months. Adding these facts to the analysis, Bishop feels the industry is probably going to record growth in the double-digit range of +14% to +20%.

At the present time, incorporating results for the first and second quarters, the table on the following page shows quarterly projections for 2026.

2024, 2025, and 2026F Connector Sales By Quarter with Percent Change

Quarter	2024 Actual	2025 Actual	YOY Change	2026 Forecast	YOY Change
1Q	\$21,281	\$22,587	6.1%	\$26,803	18.7%
2Q	\$21,042	\$23,950	13.8%	\$29,820	24.5%
3Q	\$22,353	\$26,701	19.5%	\$27,481	2.9%
4Q	\$21,802	\$25,927	18.9%	\$26,427	1.9%
Total	\$86,478	\$99,165	14.7%	\$110,531	11.5%

\$ Millions

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*2025 total has been updated to reflect average sales based on actual sales of the first three quarter sales.

These quarterly projections are based on the following forecast.

2024, 2025, and 2026F Connector Sales By Region with Percent Change

Region	2024	2025	Percent Change	2026F	Percent Change
North America	\$20,124.7	\$21,975.6	9.2%	\$23,759.5	8.1%
Europe	\$17,417.3	\$18,874.1	8.4%	\$20,117.6	6.6%
Japan	\$4,035.8	\$4,154.3	2.9%	\$4,250.7	2.3%
China	\$28,003.5	\$32,841.8	17.3%	\$36,692.5	11.7%
Asia-Pacific	\$13,483.5	\$17,882.7	32.6%	\$22,172.0	24.0%
ROW	\$3,412.9	\$3,436.1	0.7%	\$3,538.4	3.0%
Total World	\$86,477.7	\$99,164.6	14.7%	\$110,530.7	11.5%

\$ Millions

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We realize the 3rd and 4th quarters forecast numbers referenced above are extremely below what actual performance will likely be. For this reason, using information presently available, we intend to re-address the forecast indicated above. Although not finalized, we are currently working on an updated forecast for 2026 through 2031. As previously indicated, the forecast will like show +14% to +20% growth in 2026. Look for information soon, on Bishop's newly released connector industry forecast!

Significant Events

June 2026 News

Arxis to Acquire Omnetics Connector Corporation

Arxis Inc. entered into a definitive agreement to acquire Omnetics Connector Corporation. Omnetics, headquartered in Minneapolis, maintains deeply embedded positions across leading defense and space, commercial aerospace, and medical technology platforms where size, weight, and reliability are mission critical. Omnetics is currently privately held and owned by its long-term shareholders. Under the terms of the agreement, Arxis is acquiring Omnetics in an all-stock transaction (subject to lockup provisions), reflecting the Omnetics shareholders' requirement to receive public company stock over cash consideration and reinforcing one of the key drivers and benefits of Arxis becoming a public company.

Carlyle to Acquire Majority Share of Omron's DMB Segment

With the anticipation of driving Omron's next major growth phase, in March of 2026, it was announced that sometime around the first of July 2026, Omron would complete the spin-off of their Devices & Module Solutions Business (DMB). This division, which was responsible for the "manufacturing and sales of relays, switches, and connectors for customers in a wide range of industries including EV/mobility, energy infrastructure, home appliances, and industrial equipment", had sales of 105.4 billion yen (\$696 million) in 2024, a decrease of approximately -7.9% year-over-year. According to the most recent published information, connectors accounted for approximately 4% of this business.

Based on this, in March of 2026, it was approved that the DMB business via an absorption-type company split would be transferred to OMRON Devices Co., Ltd, a subsidiary. All shares of OMRON Devices Co., Ltd would then be transferred to TCG2602 Co., Ltd, a wholly owned subsidiary of TCG2601 Co., Ltd., which was established by The Carlyle Group, a global private equity investment firm. Renaming the DMB business to Aratas, the two companies, TCG2601 and TCG2602 were set up to purchase the DMB business from Omron for approximately 82 billion yen (approximately \$540 million), with the absorption type split taking effect in July of 2026. An absorption-type split as explained by Omron, allows "shares and assets related to DMB held by the Company to [will] be transferred to the successor company. In addition, shares, interests, assets, etc. related to DMB held by Omron's [our] group companies in each overseas country and region are also scheduled to be transferred to the Succession Company or the overseas subsidiary where the Succession Company or the Company is scheduled to be established.

Weidmuller USA Aligns Around Three Core Business Models

Weidmuller USA announced a strategic organizational alignment designed to enhance collaboration, streamline decision-making, and position the company for continued growth in an increasingly dynamic industrial landscape.

The organization has aligned around three core business models that reflect how customers design, build and scale their operations: Components for Cabinet & Field, Systems & Solutions, and Connectivity for Device Manufacturers.

To support this evolution, Weidmuller USA announced several leadership appointments. John Froustet has been named Senior Director, Product Portfolio Management. His team will drive product strategy and portfolio development across all three business models. Ken Crawford has been appointed Senior Director, Strategic Automation Solutions, focusing on advancing large-scale automation opportunities. Carlus Hicks will serve as Senior Director, Strategic Partnerships & Special Projects, responsible for expanding strategic partnerships,

strengthening industry relationships and leading initiatives that support long-term growth, including channel and ecosystem development.

This organizational alignment reflects Weidmuller USA's commitment to simplifying internal structures while enhancing the customer experience. By reducing complexity and strengthening collaboration, the company is better positioned to respond to market opportunities, deliver innovation at scale, and support customers with speed, expertise, and reliability.

North American PCB Market Gains Momentum with 1.60 Book-to-Bill Ratio

The Global Electronics Association announced the May 2026 findings from its North American Printed Circuit Board (PCB) Statistical Program. The book-to-bill ratio stands at 1.60.

Total North American PCB shipments in May 2026 were up 11.9% compared to the same month last year. Compared to the preceding month, May shipments were up 10.1%. May's year-to-date (YTD) shipments increased by 12.8% year-over-year (YOY).

PCB bookings in May were up 102.8% compared to the same month last year. May bookings were up 22.3% compared to the preceding month. May's YTD bookings increased 28.6% compared to the same period last year.

"The AI build-out continues to fuel strong bookings that have driven the PCB book-to-bill to historic levels. Shipments are keeping pace, up 11.9% over last year and 10.1% from April, while year-to-date orders run 28.6% ahead," said Dr. Shawn DuBravac, Global Electronics Association's chief economist.

Foxconn Reports 40% Quarterly Sales Jump, Driven by Cloud and AI Server Revenue

The world's largest contract manufacturer is quietly becoming one of the biggest players in AI infrastructure

Foxconn just posted numbers that would make most tech companies blush. The Taiwanese manufacturing giant reported unaudited consolidated revenue of T\$2.513 trillion, roughly \$78.71 billion, for the second quarter of 2026, a year-on-year increase of 39.8% that came in ahead of market expectations.

The driver is not iPhones. It is AI servers, and that shift tells you a lot about where the money in tech is actually flowing right now.

Cloud and networking products, the division that houses Foxconn's booming AI server business, now represent the single largest or near-largest slice of the company's revenue. In the first quarter of 2026, that segment was approaching half of total company revenue, a milestone that would have seemed unlikely just a few years ago for a company most people associate with building smartphones.

June alone was a record month. Revenue for that single month hit T\$821.8 billion, a 52.1% jump compared to June of the prior year.

The Q2 result follows a strong Q1 2026, when Foxconn posted T\$2.12 trillion in revenue, representing 29% year-on-year growth. The sequential acceleration from 29% to nearly 40% growth suggests demand for AI infrastructure is not plateauing, at least not yet.

PC Market Runs Low on RAM to Grow: Shipments Decline 4.9% as Memory Crunch Bites

Worldwide PC shipments fell 4.9% year over year in Q2 2026 to 68.2 million units, according to IDC — the first decline after nine consecutive quarters of growth. A persistent memory chip shortage drove the reversal, pushing vendors to pull inventory forward as far as possible.

Beyond the memory supply crunch, other components such as storage, along with geopolitical issues, have continued to weigh on the market.

“The real story here is the disconnect between units and dollars: shipments are falling, but revenue is climbing because vendors are pushing through price increases faster than demand is dropping,” said Jitesh Ubrani, research director for consumer devices at IDC. “Given worsening macro conditions and a memory shortage that isn’t expected to ease until early 2028, we don’t expect another round of inventory pull-forward, which points to a sharp slowdown in growth rates in the second half of 2026. Vendors are bracing for further price hikes into 2027, and channels are already flagging concern about elevated inventory at these higher price points.”

Emerging Trends

Amid the decline, two additional underlying trends stand out. The first is the growing risk that sustained cost pressure from the memory shortage could temper the broader PC upgrade cycle, even as interest in on-device AI processing continues to grow amid rising cloud compute costs. The second is further vendor consolidation, as top brands such as Apple, Dell, and Lenovo use their scale across adjacent business lines, including smartphones and servers, to secure memory supply and squeeze out smaller competitors.

Top 5 Companies, Worldwide Traditional PC Shipments, Market Share, and Year-Over-Year Growth, Q2 2026 (Preliminary results, shipments are in millions of units)

Company	2Q26 Shipments	2Q26 Market Share	2Q25 Shipments	2Q25 Market Share	2Q26/2Q25 Growth
1. Lenovo	16.6	24.4%	17.0	23.7%	-2.1%
2. HP Inc	13.0	19.1%	14.3	19.9%	-9.0%
3. Dell Technologies	9.3	13.6%	9.8	13.6%	-5.0%
4. Apple	6.7	9.9%	6.1	8.5%	10.1%
5. ASUS	5.0	7.4%	5.0	7.0%	0.2%
Others	17.5	25.7%	19.6	27.3%	-10.5%
Total	68.2	100.0%	71.7	100.0%	-4.9%

Source: IDC Quarterly Personal Computing Device Tracker, July 8, 2026

Global Smartphone Shipments Fall 6.7% in Q2 2026 as the Memory Crisis Splits the Market in Two

The global smartphone market shrank 6.7% year-on-year to 277.5 million units in the second quarter of 2026 (2Q26), according to the preliminary data from the International Data Corporation (IDC) Worldwide Quarterly Mobile Phone Tracker. The memory crisis continues to disrupt the smartphone market with unprecedented costs and strained supply, with Q2 2026 marking the second quarter of consecutive year-on-year decline.

“Memory costs are up nearly 300% from a year ago, and now account for over 65% of BOM at the low end, making survival increasingly difficult for OEMs with low-end portfolios,” said Nabila Popal, senior research director for Worldwide Consumer Devices, IDC. “Q2 confirms exactly what we predicted: this is not a uniform downturn; memory crisis is favoring premium players and punishing vendors exposed to the low end. For the second consecutive quarter, Apple and Samsung showed resilience as the only two vendors in the Top 5 posting growth. Apple achieved record high Q2 shipments driven by momentum for the iPhone 17 and fear of upcoming price hikes, keeping Apple on track for a record 22% annual share this year. Low-end vendors are doing their best to adjust strategy, cut costs, and shift their portfolios toward higher margin devices; however, the challenge isn’t strategy – it’s creating demand for these traditionally low-end brands at higher price segments. Consumers are increasingly opting for a premium brand when the price gap reduces, and financing is readily available.”

Top 5 Companies, Worldwide Smartphone Shipments, Market Share, and Year-Over-Year Growth, Q2 2026 (Preliminary results, shipments in millions of units)

Company	2Q26 Shipments	2Q26 Market Share	2Q25 Shipments	2Q25 Market Share	Year-Over-Year Change
1. Samsung	62.7	22.6%	58.0	19.5%	8.1%
2. Apple	55.8	20.1%	48.4	16.3%	15.3%
3. Xiaomi	31.2	11.2%	42.4	14.2%	-26.3%
4. OPPO	28.8	10.4%	34.9	11.7%	-17.5%
5. vivo	21.2	7.6%	26.3	8.9%	-19.4%
Others	77.8	28.0%	87.4	29.4%	-11.0%
Total	277.5	100.0%	297.4	100.0%	-6.7%

Source: IDC Quarterly Mobile Phone Tracker, July 13, 2026

China's Economic Uncertainty

China's economy in the second quarter of this year grew by a weaker-than-expected 4.3 percent compared with a year earlier, data released on Wednesday last week by the Chinese National Bureau of Statistics showed. It weakened from a 5 percent increase in the previous quarter and fell short of the average market consensus of an expectation of 4.5 percent. It was also the slowest expansion since the fourth quarter of 2022.

Overall, China's economy in the first half of this year expanded 4.7 percent year-on-year, the data showed. To meet the bottom of Beijing's official growth target of 4.5 to 5 percent this year, the economy needs to expand at least 4.3 percent in the second half of the year. However, an imbalance in China's economy is becoming increasingly clear: Exports remain strong, but weak domestic demand and investment continue to drag on growth.

Major global investment banks, including Morgan Stanley, Goldman Sachs Group Inc, ING Groep NV and Australia and New Zealand Banking Group Ltd, adjusted downward their full-year growth forecasts following last week's data, expecting China's economy to expand 4.5 to 4.6 percent this year. While the downgrade suggests urgency for Beijing to step up stimulus to achieve its annual growth target, a large-scale stimulus package appears unlikely, as Chinese policymakers have shown little intent to do so.

Attention is turning to the Chinese Communist Party Politburo meeting later this month as observers expect policymakers to review economic performance in the first half of this year and outline policy priorities for the second half. It remains to be seen whether any selective and targeted measures to bolster consumption and investment would be implemented.

The world's second-largest economy has for years relied heavily on state-supported, high-tech manufacturing, such as electric vehicles, robotics and semiconductors, but downturns in the broader, job-creating service and traditional industries have worsened. While exports soared to record highs in the past few months, that strong performance masks weakness in domestic demand and has yet to trickle down to the broader economy; it is also starting to trigger frictions with trading partners.

Li estimated that China's broad unemployment rate is 10.2 percent, about double the official figure. He warned of a hidden unemployment crisis involving 24 million long-term unemployed people. Of them, 13 million are young people aged 16 to 24. The emerging high-tech manufacturing sector could not easily absorb job losses in the real-estate, construction and service sectors, he said.

Li said local governments are preoccupied with repaying old debts rather than investing in productivity or infrastructure to create jobs. However, he was most alarmed by the unprecedented weakness in China's fixed-asset investment, which contracted 3.8 percent last year — the first decline since 1996 — and has continued to fall this year. Official data released on Wednesday last week showed fixed-asset investment dropped 5.7 percent year-on-year in the first half, with infrastructure investment down 2.4 percent, real-estate investment 18 percent, public construction investment 2.3 percent and private investment 8.5 percent. Despite resilient high-tech manufacturing, factory output and AI-related exports, domestic investment remained weak as the prolonged property downturn weighed heavily.

In short, China faces structural problems in its economy. On the one hand, exports remain strong, but competition is intensifying and profit margins for exporters are dwindling.

AI Computing Demand Lifts Fiber Prices and Volume

AI data-center buildouts are driving global demand for high-speed optical interconnects and triggering a new round of capacity expansion in China's fiber-optic industry. Since the fourth quarter of 2025, fiber prices have continued rising alongside demand for higher-end products, prompting incumbents such as FiberHome to expand preform and specialty fiber capacity, while attracting cross-sector players including Lingyi iTech, Han's Laser, and Hoshine.

Industry players say fiber manufacturing still faces barriers in equipment, processes, and customer qualification, and whether newcomers can achieve mass production and win market acceptance remains to be seen.

Prices climb as AI demand shifts the market

Market sources said the fiber market is gradually shifting from traditional telecom infrastructure to AI computing networks. Recent spot prices for mainstream G. 652.D single-mode fiber have risen from less than CNY20 (US\$2.95) per core-kilometer at the start of 2025 to about CNY100, while high-priced orders have exceeded CNY110. G. 657. A2 fiber used for high-density data-center cabling has climbed even more sharply, from CNY32 per core-kilometer to CNY240, a gain of about 650%, reflecting the tight supply of higher-end products.

As demand grows for AI server clusters, high-speed switches, and optical modules, the share of high-value fiber shipments is rising, pushing more Chinese fiber makers to launch new expansion plans.

Samsung Cuts Hundreds of US Jobs While AI Boom Sends Chip Profits Soaring

Samsung is cutting hundreds of jobs from its US consumer electronics business as it prepares to move the division's headquarters from New Jersey to Texas. The restructuring comes as the company's semiconductor operation is generating record profits from the AI boom, while the divisions selling phones, TVs, and appliances are struggling with the resulting surge in chip prices.

Samsung Electronics America said 739 roles at its Englewood Cliffs, New Jersey offices have been affected by the relocation. The majority of those workers have been offered positions in Texas, though others have been laid off. Around 100 employees at Samsung's Plano, Texas, site, including staff from the mobile division, have also reportedly lost their jobs.

Samsung Electronics America employs about 1,200 people in the state of New Jersey, meaning the 739 affected roles represent more than 60% of its local workforce. Internal documents sent to employees on June 30 described an enterprise-wide reduction in force with a significant number of impacts.

Surprisingly, employees only moved into the Englewood Cliffs offices last September. The facility replaced Samsung's former Ridgefield Park headquarters, which had served the Korean giant since 1992.

Samsung said the Texas move is designed to bring more teams together, improve collaboration, and align jobs with its priorities. The company insists there is no broad global restructuring underway in its consumer products business. However, employees are reportedly concerned that more cuts could follow, alongside a possible consolidation of the appliance, home entertainment, and mobile divisions.

Gartner Forecasts Worldwide AI Platforms and Models Market to Grow 63% in 2026

Worldwide end-user spending on AI models and platforms is projected to total \$64 billion in 2026, up 63.4% from \$39 billion in 2025, according to Gartner, Inc., a business and technology insights company. Spending on GenAI models is forecast to grow 117%, while AI platform spending will rise 36.9% in 2026.

“Enterprise AI budgets are coming under greater scrutiny, with increased focus on usage efficiency, cost control and measurable outcomes,” said Arunasree Cheparthi, Sr Principal Research Analyst at Gartner. “Spending is shifting toward providers who can demonstrate clear value across cost, latency, performance and reliability.

“This is giving an edge to providers that embed evaluation, cost transparency and usage tracking into customer workflows, making it easier to manage and optimize AI use. However, as spending becomes more usage-driven, providers face increasing pressure to demonstrate real adoption, sustained use and durable margins.”

This dynamic is accelerating growth in domain-specific language models (DSLMS) and specialized models, which are forecast to grow 210% in 2026.

India's Smartphone Shipments Fall as Memory Costs Bite

India's smartphone market was hit by a sharp second-quarter decline that may matter well beyond the country's borders, as higher component costs lifted prices and dampened demand. The drop underscores how global memory shortages, inflation, and weaker spending are reshaping handset sales, especially in value-driven markets across Asia and emerging economies.

India's smartphone shipments fell 10% year on year in the quarter ended June 2026, according to Counterpoint Research's Monthly India Smartphone Tracker, marking the steepest fall for a June quarter in six years. Counterpoint said record-high memory prices were the main driver, pushing up smartphone prices across nearly all segments and lengthening replacement cycles despite promotions and financing offers.

Senior Analyst Prachir Singh said the market was squeezed on both the supply and demand sides. On the supply side, persistent increases in memory and other component costs led most major original equipment makers to raise prices several times, lifting average smartphone prices by about 15% by the end of the quarter. On the demand side, macroeconomic headwinds, inflation, and weak discretionary spending reduced upgrade activity. The mass-market category, defined as devices below INR15,000 (US\$ 155), was the hardest hit, with shipments down 45% year on year.

Phone Prices to Surge in 2H26 as Low-end Models Fade

As the AI boom keeps memory shortages running hot, steep price hikes for smartphones in the second half of 2026 are coming into view. Global market researchers have issued increasingly bleak forecasts, warning that "chipflation" could last through 2027 and that surging memory prices are already lifting the cost of consumer devices.

The Maeil Business Newspaper, citing Counterpoint Research data, said memory prices jumped 40% to 50% in the fourth quarter of 2025 and first quarter of 2026, then rose another 20% or so in the second quarter of this year. Because DRAM and NAND Flash are essential smartphone components, the rapid increases are squeezing brands' margins.

Omdia forecasts that global smartphone shipments in 2026 will fall about 12.2% from 2025 to around 1.1 billion units, while average selling prices (ASP) will rise from US\$467 in 2025 to US\$565 in 2026, up 21%. That shift suggests the smartphone market is moving away from volume growth and toward price protection, with low-end and entry-level models taking the first hit.

Memory inflation breaks the usual price-down cycle

In the past, electronic device prices typically drifted lower after launch as channel promotions and component costs eased. But with memory supply tight and costs rising, that pattern is breaking down.

Samsung Electronics, Apple, Xiaomi, Vivo, and Oppo are among the major global smartphone and electronics brands facing price pressure in 2026. Some vendors are raising launch prices, while others are cutting their low-end supply or increasing the price of higher-storage models to soften the cost blow.

For Apple, reports in June 2026 said some MacBook and iPad models saw price increases of US\$100 to US\$300. The market broadly sees higher memory and chip prices as a key factor pushing up end-device prices.

The Chinese market is under pressure as well. IDC data shows that China smartphone shipments in the second quarter of 2026 fell 4.3% year on year to 66 million units, marking the fifth straight quarter of decline. Rising memory and component costs are forcing most Android brands to lift prices or reduce low-end production, further weighing on demand.

With consumer demand cooling, smartphone makers are finding it difficult to fully pass higher costs on to customers. If prices rise too much, upgrade demand could weaken further; if prices do not rise, companies must absorb the costs themselves, hurting margins.

Reuters reported that the memory shortage has already pushed up phone prices and weakened consumer demand, with global smartphone shipments in the second quarter of 2026 falling 11% year on year to the lowest level for the period since 2013. That reflects how chipflation is hitting both supply and demand at the same time.

The AI memory crunch is spreading from data centers and servers into consumer devices such as smartphones. In the past, phone pricing was driven mainly by brand, cameras, displays, and processors. Now memory costs are becoming a new pricing variable. Beginning in the second half of this year, the smartphone industry might see reduced shipments and a shift where low-end models fade away. Meanwhile, devices with higher storage options could become more costly, and flagship phones might see increased prices.

Nvidia details its Next Generation Vera CPU for AI, Setting up Challenge to AMD and Intel

Nvidia became the most valuable company because of insatiable demand for its graphics processing unit, or GPU, the primary chip used for creating and deploying artificial intelligence.

But the chip giant is now shipping its own central processing units, or CPUs, which cloud providers could decide to deploy in place of those from Advanced Micro Devices and Intel, opening up a new battleground in AI servers.

Nvidia released new information about its data center CPU, called Vera, including specifications and the kind of benchmarks and architectural information that prospective customers need to fully evaluate the chip. Nvidia representatives said Vera chips were delivered to clients, including OpenAI, Anthropic, and SpaceX, in June.

Nvidia is seen as the company that sets the direction for the information technology industry. But in CPUs, Nvidia is the challenger once again, competing against two well-established players in Intel and AMD, which have deep ties to hyperscalers and cloud giants.

The company's investment in CPUs is another example of Nvidia's strategy to vertically integrate its systems and produce more of the chips and technology inside them every year. It aims to sell the entire system as a full rack of computing power, instead of simply selling chips by themselves.

It's a strategy that Nvidia says will help engineers squeeze more performance out of their GPUs, helping the company's systems remain the computers of choice for leading AI labs as competition from AMD and custom chips heats up.

Before the AI boom, the CPU was the most important and most expensive part in a server. The first generation of AI servers available when ChatGPT was released in 2022 paired as many as eight GPUs to one CPU, signaling a shift towards Nvidia's GPUs.

But the rise of agentic AI, which can run independently in the background with minimal human input, has returned attention to the CPU, which is needed to babysit and feed data to an agent. Financial markets have noticed, and CPU incumbents AMD and Intel are among the two best-performing chip stocks so far in 2026, up 128% and 149% respectively, besting Nvidia's rise of 8%.

Agents have made CPUs "much more integral," Ian Buck, Nvidia's vice president of hyperscale, said at a presentation last week. "Particularly how fast a CPU can answer one question."

Nvidia said the whole server CPU market could eventually be worth \$200 billion, while a Bernstein estimate from earlier this year said the mature server CPU market in total was worth about \$37 billion in 2025.

Wolfe Research said in May that it expected the average selling price to be about \$5,000 per Vera chip and forecast that Nvidia would ship about 1.3 million of them this year. Nvidia declined to comment on pricing.

Gartner analyst Kevin Knox said that AMD is currently the company to beat in enterprise AI server CPUs. AMD reportedly holds about 33% of the market for server CPUs, and Intel has 66.8%, but AMD is gaining share and has deep relationships with hyperscalers.

Nvidia said last week that Vera is the first server CPU that it has designed from the core, as opposed to using an off-the-shelf design provided by Arm, which requires less engineering work.

The company said Vera was specifically designed to address bottlenecks in AI agents, and that its chip has 50% better performance for AI agents than x86 chips, the type of silicon that Intel and AMD make.

That's because previous CPUs for clouds from Intel and AMD focused on core count, but Nvidia's chip and Olympus core focuses on single-core speed instead, Nvidia said.

The CPU is power-hungry, using between 250 watts and 450 watts of power. The chip also uses a huge amount of low-power memory, the same kind used in laptops and phones, supporting up to 1.5 terabytes of memory per chip.

SpaceX Awards Foxconn a Part in a Huge \$52 Billion Order For 13,000 Racks Of NVIDIA GB300 AI Servers, Where Each Rack Costs \$4 Million and the Total Order Spans Nearly 1 million GPUs

According to a report by a Taiwan-based publication, SpaceX has just awarded Foxconn a part in a new \$52 billion order for around 13,000 racks of NVIDIA GB300 AI servers, with shipments expected to begin in Q4 2026 and continuing until Q1 2027, with each rack costing around \$4 million. Also, the order spans 936,000 NVIDIA GPUs. Do note that it is not yet clear if this entire order goes to Foxconn or SpaceX plans to divide its procurement among other rack assemblers as well.

At any rate, Foxconn expects to corner around 40 percent of the global AI server market by the end of 2026. And, critically, this order is not a part of that calculation, which suggests a material upside to Foxconn's projections lies ahead. What's more, with this order, Foxconn has managed to break through the Dell/Supermicro duopoly.

As we reported recently, as of May 2026, SpaceX's Colossus 1 data center supported over 220,000 NVIDIA GPUs, divided between H100, H200, and around 30,000 units of the GB200 AI accelerators.

Meanwhile, the Colossus 2 data center currently boasts of over 550,000 GPUs, divided between GB200 and GB300 accelerators.

Do note that, in the run-up to its IPO, SpaceX locked a Cloud Service Agreement with Google, furnishing it with a compute capacity equivalent to "110,000 NVIDIA GPUs, CPUs, memory, and other related components," all for a consideration of \$920 million per month.

Also, the parent company of Starlink recently inked a similar agreement with Anthropic, providing access to "220,000 NVIDIA GPUs (including H100S, H200S, GB200s, and others)," all for a consideration of \$1.25 billion per month or \$15 billion per year.

China Smartphone Shipments Fall 3% in First Half as Huawei Regains No. 1

China smartphone shipments fell about 3% in the first half of 2026, even as major vendors accelerated new product launches and pushed harder into mid- to high-end models to protect margins. Huawei reclaimed the No. 1 market share position in China, while Apple and other rivals prepared new devices for the second half, according to the source material.

Huawei's comeback in the domestic market came despite US sanctions and other pressures that have limited its global handset expansion. Recent sales of models including the Enjoy 90 Pro Max helped lift the brand, and the market is now watching a new wave of premium releases aimed at Apple's next iPhone cycle.

Industry expectations point to a busy launch calendar in the second half. Huawei is expected to introduce the Pura X2 series in August, followed by the Mate 90 series and a next-generation foldable in September. Oppo has stepped up promotion of its Reno line and is also expected to unveil several Find series models, including the foldable Find N7 with a wide-screen format close to a 4:3 aspect ratio.

According to Counterpoint Research, the second-quarter slowdown reflected a more conservative shipment strategy as brands shifted from volume growth to profitability. Vendors reduced low- and mid-tier output to defend gross margins and redirected resources toward higher-margin devices, helping push the market further toward premium products. Apple and Huawei posted shipment growth in the quarter, with Huawei holding a 23% market share and Apple at 18%, while Oppo, Honor and Vivo each lost about 2 to 3 percentage points of share.

Hon Hai Eyes Production at Texas Site

Hon Hai Precision Industry Co, the world's largest contract server maker, said it expects to begin small-volume production of artificial intelligence (AI) servers at its Texas plant.

The plant would handle back-end assembly and system integration, including Level 10 and Level 11 assembly processes, a source familiar with the matter told the Taipei Times.

The servers would be assembled by humanoid robots and robotic arms developed with Nvidia Corp, the source said.

Hon Hai is testing a wide range of robots at its US server facilities, including industrial robotic arms and humanoid robots, rather than relying on a single type of robot, said the source, who declined to be named.

Hon Hai chairman Young Liu in November last year said that the company was working with Nvidia to build a next-generation smart AI server manufacturing facility at its plant in Houston, Texas.

The production line is expected to be among the world's first to deploy humanoid robots powered by Nvidia's Isaac GR00T N model, Liu said at the time.

Aside from its Houston facility, Hon Hai also operates plants in Wisconsin and Ohio in the US.

The Houston facility produces smartphones and AI servers, while the Wisconsin facility manufactures servers, the source said.

The Ohio plant's production is adjusted according to orders and the testing requirements of potential new products, such as electric vehicles (EVs), automotive components and batteries, the source said.

Hon Hai last year also announced that it would establish a joint venture in the US with Intrinsic, Google's robotics software subsidiary, to develop AI-powered smart factories.

The collaboration has since made tangible progress, with related applications deployed at Hon Hai's US factories for server manufacturing, the source said.

Hon Hai is one of the Taiwanese manufacturers leading the efforts of the Taiwan Electrical and Electronic Manufacturers' Association to establish overseas high-tech parks. The association has planned five overseas high-tech parks, with a site in Miekinia, Poland, already confirmed.

Among the remaining projects, which are in the US, Mexico, India and the Philippines, Mexico is moving the fastest, with site selection expected to be finalized as early as next week, potentially in Ciudad Juarez, association vice chairman Wilson Hu said yesterday.

It is still evaluating potential sites in Texas and Arizona, with El Paso among the locations under consideration in Texas, Hu said.

Arizona's semiconductor cluster is gradually taking shape following Taiwan Semiconductor Manufacturing Co's investment in the state, so companies entering the proposed park there would likely focus on the semiconductor supply chain, he said.

Texas has a more diverse industrial base, so recruitment there would target companies involved in AI, EVs, new energy, and other electrical and electronics supply chains, he said.

The association would primarily seek participation from its more than 3,000 member companies as part of efforts to expand their overseas presence, Hu added.

Wistron Opens First US Smart Manufacturing Facility

Artificial intelligence (AI) server maker Wistron Corp opened its smart manufacturing facility in Fort Worth, Texas, where one of Nvidia Corp's most advanced AI systems has entered mass production.

The D1 facility is Wistron's first manufacturing base in the US. Built at a cost of US\$700 million, it spans approximately 30,100m².

The Fort Worth plant would be the first to mass produce Nvidia's GB300 Grace Blackwell Ultra chips in the US, Wistron chairman Simon Lin said at the opening ceremony.

It would also be capable of manufacturing Nvidia's next-generation Vera Rubin chips, he said.

The D1 plant, which has an automation rate of about 60 percent, is only the beginning, Lin said, adding that Wistron is already planning a second facility, D2, which is expected to be twice the size of D1.

As Wistron expands its advanced manufacturing capabilities, it will continue to develop a local supply chain covering everything from chips to complete systems, he said.

The next stage of the AI industry would not be built from a single production base, but through a global presence, Lin said.

Wistron acquired the D1 plant in April last year and began mass production this month to meet customer demand, Wistron president and CEO Jeff Lin said.

Having Taiwanese companies such as Taiwan Semiconductor Manufacturing Co, Hon Hai Precision Industry Co and Wistron invest in and build manufacturing facilities in the US is "a great service and partnership," Huang said, adding that "the United States should be very grateful."

He also noted that, outside the US, Nvidia's largest manufacturing operations are located in Taiwan.

Discussing manufacturing in the US, Huang acknowledged that costs are higher and that the supporting industrial ecosystem is less developed than in Taiwan, adding that it would take time to mature.

Even so, he said now is a good time to invest because of surging demand for AI, arguing that rebuilding US manufacturing capacity is important not only for the US but also for the global supply chain.

Why Europe is Suddenly Betting Big on Drones

Europe has spent years rebuilding its military in response to Russia's invasion of Ukraine. Now, investment is increasingly converging around one technology that is seen as central to the continent's future security: drones.

A flurry of announcements over the past two weeks shows just how quickly that shift is accelerating. NATO unveiled a new drone initiative, the U.K. earmarked billions of pounds for drones and counter-drone systems, Germany moved to procure 50,000 drones for Ukraine, and defense tech startup Helsing secured an \$18 billion valuation.

The developments reflect a broader shift in military planning, with drones and autonomous systems moving from niche battlefield tools to a core part of modern warfare. The trend is creating opportunities not only for drone manufacturers but also for companies developing AI, software, electronic warfare and secure communications.

Battlefield lessons from Ukraine – alongside Iran's use of low-cost Shahed drones in the Middle East – have shown the importance of relatively inexpensive, AI-enabled drones that can gather intelligence, extend the reach of conventional weapons and increasingly operate autonomously.

Last week, NATO Secretary General Mark Rutte said the military alliance would become "drone-ready," as he announced a drone initiative in which allies would invest more than \$40 billion in counter-drone capabilities over the next five years.

Drones have "fundamentally altered" the character of modern warfare and have become a "decisive factor" on the battlefield, Rutte said, citing the Russia-Ukraine war as one example.

Low-cost drones are also increasingly being paired with high-end weapons to improve their effectiveness by distracting or overwhelming enemy air defenses.

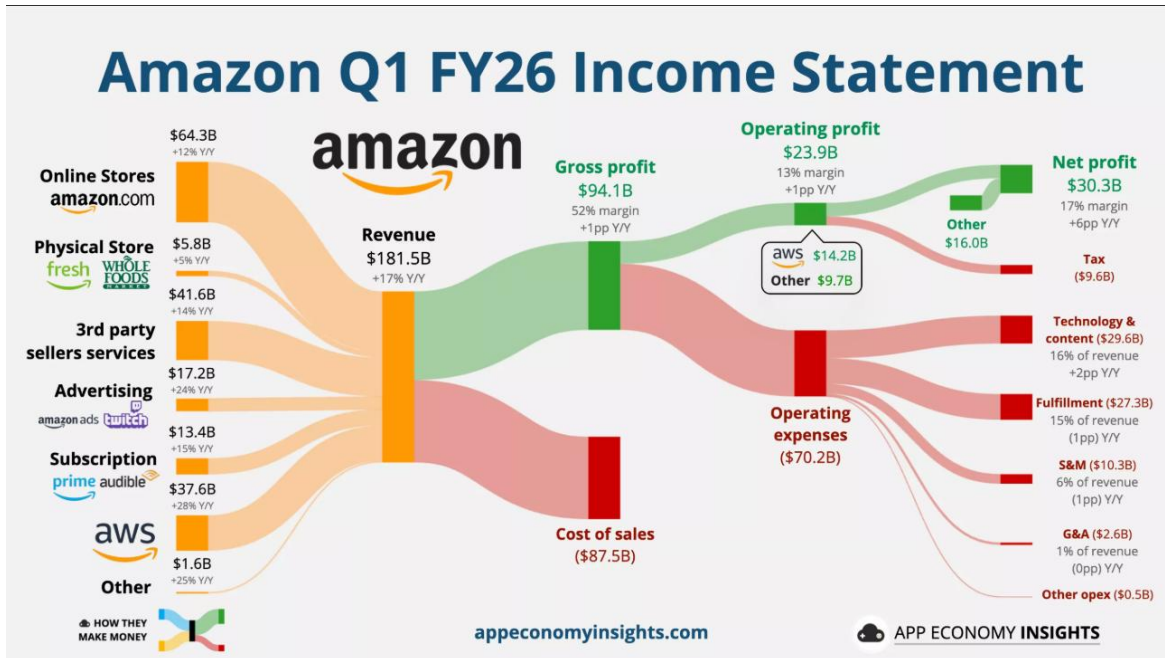
It comes as European core defense spending has doubled since 2019 and, under NATO's 3.5% target for 2035, could reach about 800 billion euros by 2030 – roughly 2.9 % of GDP – according to McKinsey.

Amazon, Meta, Microsoft, and Other US Tech Giants are Hiding \$1.65 trillion in AI Debt

Amid growing talk of an AI bubble, a study by Japanese market analysts has found that five of the largest American technology companies are carrying a collective "hidden" debt of over \$1.65 trillion, driven largely by massive spending on AI infrastructure. That undisclosed sum exceeds the \$1.35 trillion the same companies have officially reported on their balance sheets, and it has grown eightfold over the past four years.

According to estimates from Nikkei Asia, Alphabet, Microsoft, Amazon, Meta, and Oracle have together amassed roughly \$3 trillion in total debt, a large share of it tied to exorbitant AI infrastructure spending – long-term data center lease agreements, along with costly servers, graphics accelerators, and other computing hardware that has yet to be delivered.

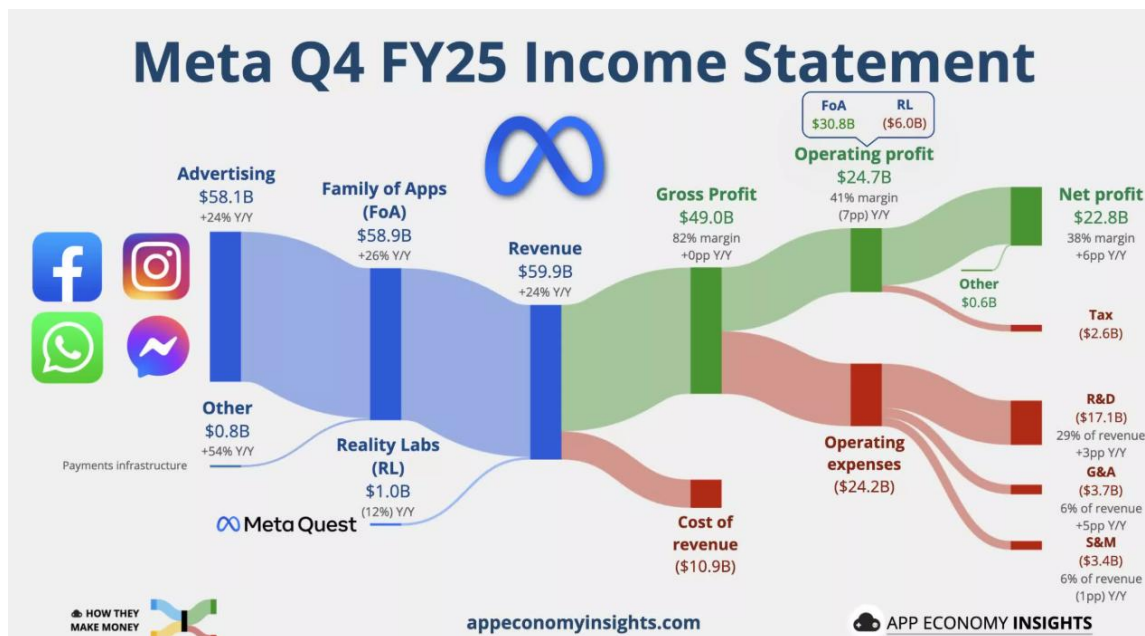
The report notes that less than half of the true debt figure appears directly on balance sheets, with the remainder disclosed only in accounting footnotes attached to SEC filings. Nikkei was careful to point out that the financial commitments behind this debt are legal under US law, but that the way they're reported makes it harder for retail investors to accurately gauge these companies' financial health.



Of the five companies in the study, Meta carries the largest estimated hidden debt, at around \$420 billion – nearly three times what it disclosed in its FY 2026 financial statement.

The company's Hyperion data center in Louisiana, for instance, includes a \$27 billion investment from Blue Owl Capital that never appeared in its official earnings report. It's a fully legal maneuver under current US accounting rules, but one that illustrates just how much can stay out of view.

Oracle's hidden debt has grown roughly 30-fold over the past four years, reaching \$273.3 billion as of the end of May 2026. Most of that stems from long-term leasing agreements with third-party data center operators, part of the company's push to expand its Stargate AI data center project across sites in Texas, New Mexico, Michigan, and Wisconsin.



While much of this debt remains invisible to everyday investors, institutional players and credit rating agencies are starting to take notice. Morgan Stanley and Moody's have both raised concerns about the practice, and S&P recently downgraded Oracle's short-term rating from A-2 to A-3, and its long-term rating from BBB to BBB-, placing it just one notch above junk status.

CD Sales Are Up 16%, But Half the Buyers Don't Even Own a CD Player

Sony would like you to think physical media is dead but according to recent data from Luminate, that's not the case across the board. In fact, some formats are actually experiencing a resurgence. In the first half of 2026, sales of CDs shot up 16 percent in the US to 16.3 million units.

Much of the growth can be attributed to younger buyers, but here's the unexpected part. According to the market research firm, roughly half of Gen Z and Millennial CD buyers don't even own a CD player. So, why are people buying CDs without a way to listen to them?

Luminate said the data suggests CDs have been reclassified from a functional audio format into an affordable collectible. In a world that's increasingly digital, physical goods are becoming more rare by the day. Physical media like CDs and vinyl is a holdover from an earlier time, and today's youth are discovering some of the same qualities that buyers from yesteryear enjoyed – namely, owning a tangible product and being able to appreciate it at any point and time without an active Internet connection.

The sales data correlates to the type of music young people are listening to as well. Luminate said 60% of Gen Z consumers aged 13-24 listen to music from the 90s or earlier. For comparison, only 18% of respondents said they listen to older music when asked the same question back in 2021.

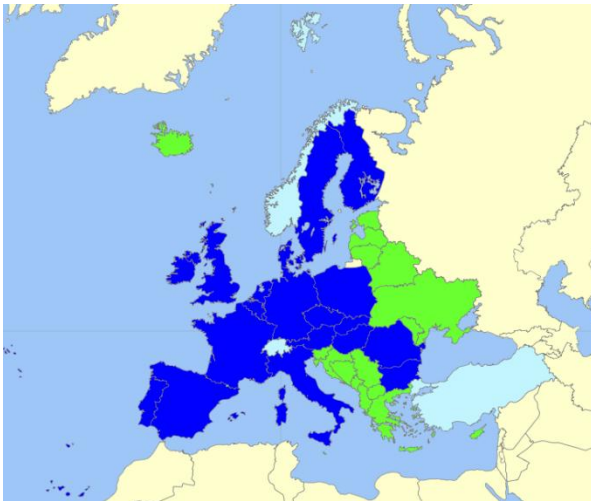
More than half – 55% – cited nostalgia as having a direct influence over their CD purchases.

Sales of physical media may be down compared to digital, and the latter certainly has its advantages, but some clearly **aren't** ready to see physical media disappear just yet.

European Connector Market 2024, 2025, 2026F, and 2031F

Bishop & Associates, a leader in electronic connector research, has just released a new 2026 European Connector Market research report. This comprehensive, four-chapter, 294-page, report analyzes all aspects of the \$18.9 billion European electronic connector market.

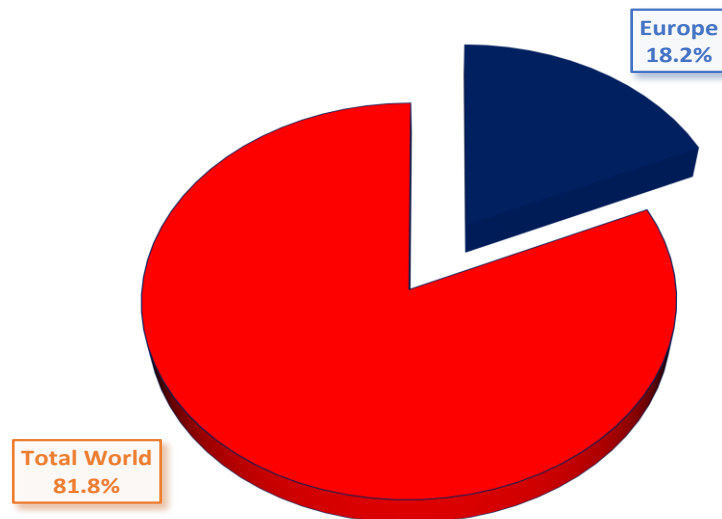
The report provides detailed connector statistics by end-use equipment/market sector and product category for 19 countries/regions. Included is an overview chapter of the European region. Data is provided for the years 2024, 2025, 2026F, and a forecast for 2031 (including five-year CAGRs).



The countries and regions covered within the report include Austria, Benelux, Bulgaria, Czech Republic, Finland, France, Germany, Hungary, Ireland, Italy, Poland, Romania, Slovakia, Iberian Peninsula, Switzerland, Turkey, United Kingdom, Scandinavia, and the group Other Countries.

An introduction to the European connector market is provided in chapter 1, putting it in context with the world connector market, and showing the relative importance of the European connector market. This chapter also highlights the impact of currency exchange and provides some insight into the different speed at which the connector market in Western Europe is growing when compared to the Central and Eastern regions. Also examined are the top 10 connector manufacturers whose base of origin is Europe.

2025 European Connector Sales as a Percentage of the Total World



European Connector Market 2024, 2025, 2026F, and 2031F

Chapter 2 provides an overview of the European market by end-use equipment/market sector and product type for the designated years. An overview of the European market by country, including a 5-year CAGR and a listing of the top five countries by market sector is also provided.

European Connector Sales by Country 2024, 2025, and 2026F

Country or European Region	2024	2025	Percent Change	2026F	Percent Change
Austria	\$X.X	\$X.X	Y.Y%	\$X.X	Y.Y%
Benelux	\$X.X	\$X.X	Y.Y%	\$X.X	Y.Y%
Bulgaria	\$X.X	\$X.X	Y.Y%	\$X.X	Y.Y%
Czech Republic	\$X.X	\$X.X	Y.Y%	\$X.X	Y.Y%
Finland	\$X.X	\$X.X	Y.Y%	\$X.X	Y.Y%
France	\$X.X	\$X.X	Y.Y%	\$X.X	Y.Y%
Germany	\$X.X	\$X.X	Y.Y%	\$X.X	Y.Y%
Hungary	\$X.X	\$X.X	Y.Y%	\$X.X	Y.Y%
Ireland	\$X.X	\$X.X	Y.Y%	\$X.X	Y.Y%
Italy	\$X.X	\$X.X	Y.Y%	\$X.X	Y.Y%
Iberian Peninsula	\$X.X	\$X.X	Y.Y%	\$X.X	Y.Y%
Romania	\$X.X	\$X.X	Y.Y%	\$X.X	Y.Y%
Poland	\$X.X	\$X.X	Y.Y%	\$X.X	Y.Y%
Slovakia	\$X.X	\$X.X	Y.Y%	\$X.X	Y.Y%
Switzerland	\$X.X	\$X.X	Y.Y%	\$X.X	Y.Y%
Scandinavia	\$X.X	\$X.X	Y.Y%	\$X.X	Y.Y%
Turkey	\$X.X	\$X.X	Y.Y%	\$X.X	Y.Y%
United Kingdom	\$X.X	\$X.X	Y.Y%	\$X.X	Y.Y%
Other Countries	\$X.X	\$X.X	Y.Y%	\$X.X	Y.Y%
Total Europe	\$X.X	\$X.X	Y.Y%	\$X.X	Y.Y%

\$ Millions

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European Connector Market 2024, 2025, 2026F, and 2031F

In chapter 3, each of the countries/regions previously mentioned is analyzed. Detailed charts and tables provide information on the individual country in terms of market sectors and product categories for 2024, 2025, and 2026F, with a forecast for 2031.

France 2025	Computers and Peripherals	Business Office Equipment	Instruments	Medical Equipment	Industrial Equipment	Automotive Equipment
PCB	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X
Rectangular I/O	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X
IC Sockets	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X
RF Coax	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X
Circular	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X
Telephone/Telecom	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X
Fiber Optic	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X
Terminal Blocks	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X
Heavy Duty	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X
Power/High Voltage	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X
Application Specific	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X
Other Connectors	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X
Total	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X

\$ Millions

France 2025	Transportation Equipment	Military Electronics	Data/Telecom Equipment	Consumer Electronics	Other Electronics Equipment	Total
PCB	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X
Rectangular I/O	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X
IC Sockets	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X
RF Coax	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X
Circular	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X
Telephone/Telecom	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X
Fiber Optic	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X
Terminal Blocks	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X
Heavy Duty	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X
Power/High Voltage	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X
Application Specific	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X
Other Connectors	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X
Total	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X	\$X.X

\$ Millions

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