

16 Months of Continuous Double-Digit Sales Growth

Regional Performance:

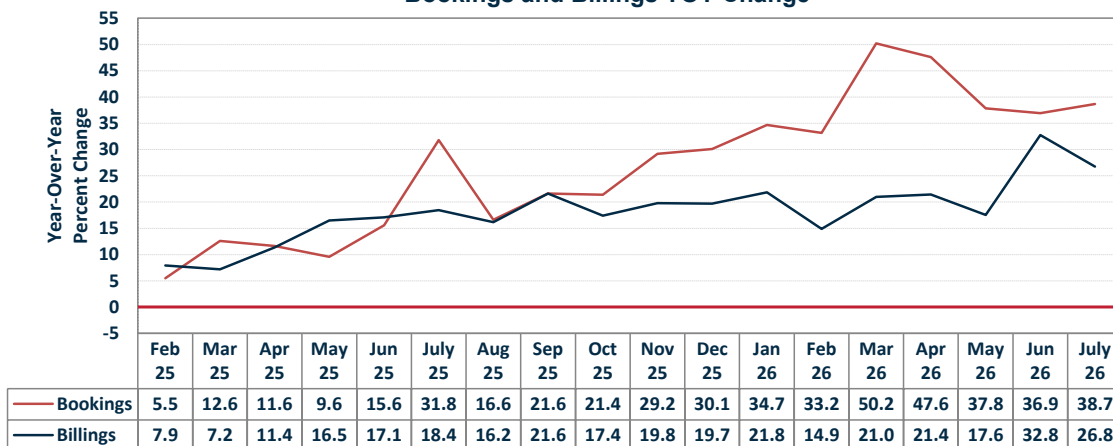
Year-to-date, sales for July are positive in all regions. The greatest growth, as was seen in the last seven months, is in the Asia Pacific region. Although still positive, the weakest growth was once again seen in the Japanese region. From a booking perspective, all regions except the Asia Pacific region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

2026 Currency Impact:

The industry registered a YOY increase in sales in July 2026, of +26.8 in USD and +27.5% in local currency.

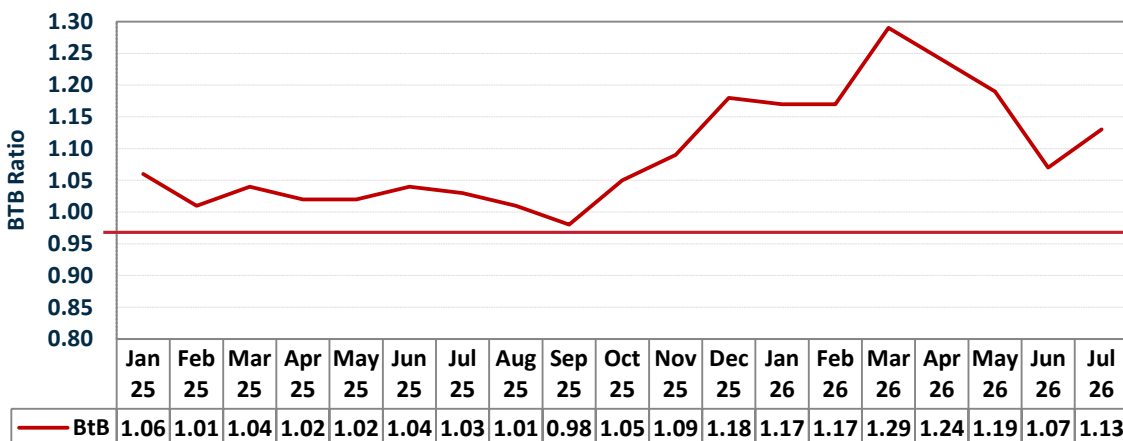
July bookings increased by +38.7%, while billings increased by +26.8%.

Bookings and Billings YOY Change



The book-to-bill ratio in July was 1.13, up from 1.07 in June. This is the 20th time in the last 22 months that the book-to-bill was over 1.00.

Connector Industry Book-to-Bill



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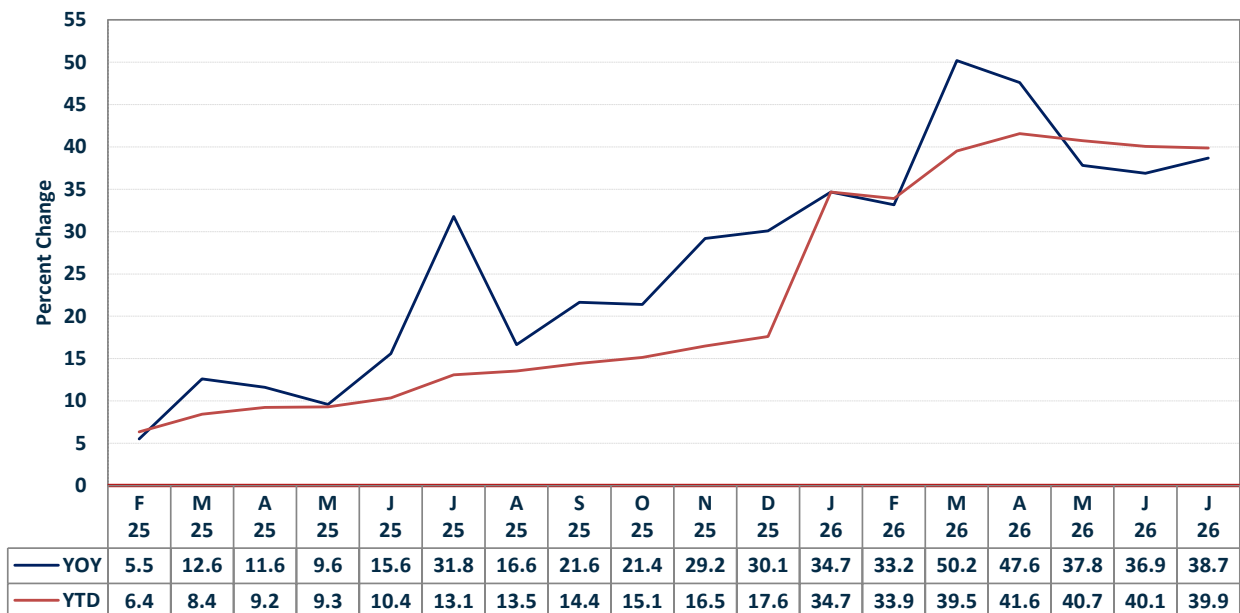
Top 100
Connector
Manufacturers

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%	1.5%	4.4%	32.0%	38.7%	6.4%	13.1%	39.9%
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



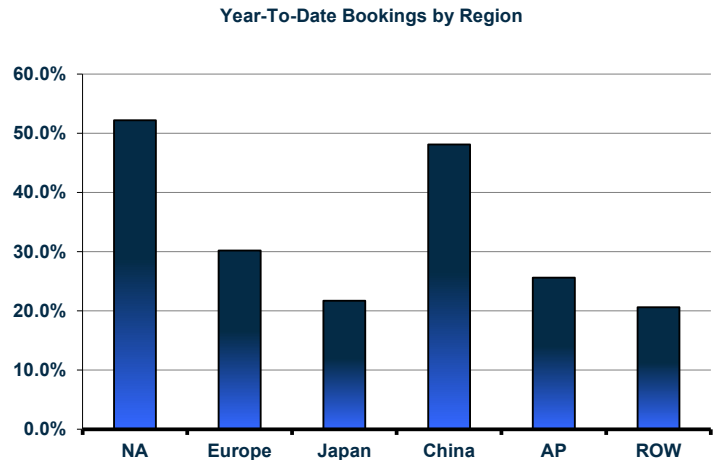
- July bookings increased +38.7% year-over-year.
- Orders increased +1.5% on a sequential basis in June.
- The book-to-bill ratio for July was 1.13, up from 1.07 in June.

Regional Performance: BOOKINGS

July 2026 Bookings

Region	Sequential	YOY	YTD
NA	-9.5%	41.8%	52.2%
Europe	2.1%	38.4%	30.2%
Japan	46.2%	58.6%	21.7%
China	32.4%	69.2%	48.1%
AP	-36.7%	-21.7%	25.6%
ROW	11.9%	26.4%	20.6%
Total	1.5%	38.7%	39.9%

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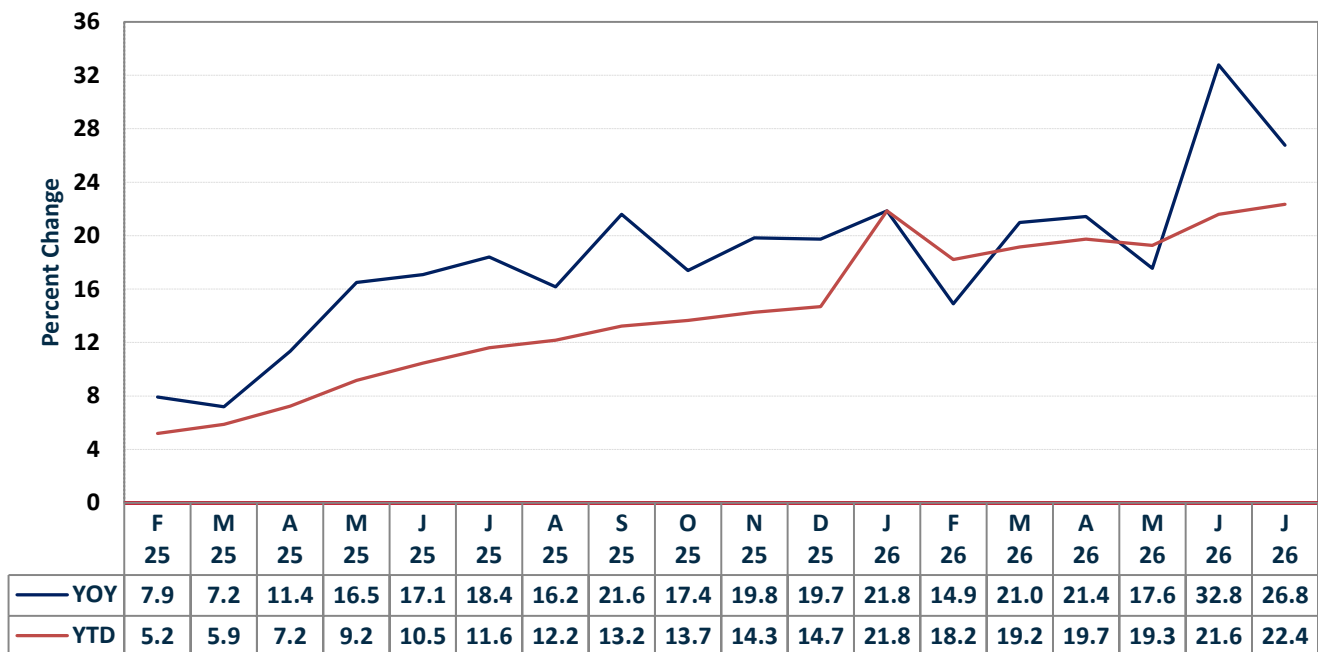
- Year-to-date, July bookings increased +39.9%, with the greatest growth in the North American region, where bookings increased +52.2%, followed by China with growth of +48.1% and the European region where bookings increased +30.2%. The lowest growth was seen in the ROW region, where year-to-date bookings increased +20.6%.
- From a year-over-year perspective, total world sales grew +39.9, up from 36.9% in June, with the greatest growth in the Chinese region, at +69.2%, followed by the Japanese region, where year-over-year bookings increased +58.6%. The least growth was seen in the Asia Pacific region where bookings declined -21.7%. This is the first time since December of 2023 that the Asia Pacific region has had negative year-over-year bookings.
- Sequentially, sales grew in four of the six regions, Japan, where sales grew +46.2%, China where sales grew +32.4% the ROW region at +11.9% and the European region where bookings grew +2.1%. The remaining regions, North America and the Asia Pacific region saw sequential bookings decline -9.5% and -36.7% respectively.
- Year-over-year total world order growth has now been positive for 28 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%	1.5%	10.1%	11.4%	21.4%	2.7%	7.2%	19.7%
May	4.3%	11.6%	8.1%	2.8%	16.5%	17.6%	2.7%	9.2%	19.3%
Jun	-4.9%	-6.9%	5.1%	3.3%	17.1%	32.8%	2.8%	10.5%	21.6%
Jul	1.8%	0.9%	-3.6%	7.1%	18.4%	26.8%	3.4%	11.6%	22.4%
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



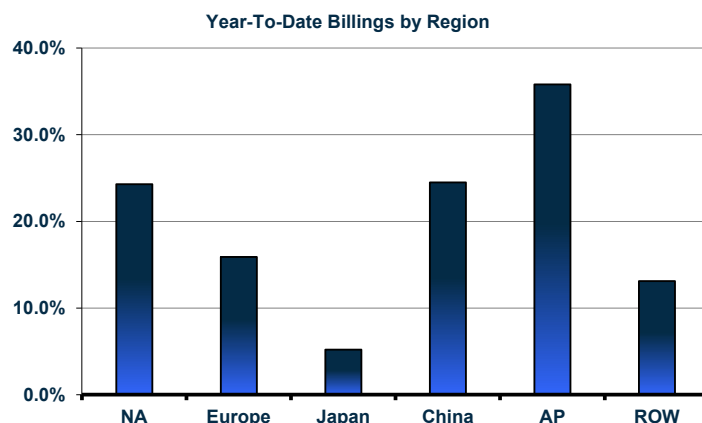
- July billings grew +26.8% year-over year and +22.4% year-to-date.
- Sequentially, July billings decreased -3.6%.
- Year-over-year sales growth has now been positive for 28 consecutive months and year-to-date for 31 consecutive months.

Regional Performance: BILLINGS

July 2026 Billings

Region	Sequential	YOY	YTD
NA	-4.9%	35.6%	24.3%
Europe	-3.4%	22.6%	15.9%
Japan	2.1%	7.4%	5.2%
China	7.9%	33.9%	24.5%
AP	-19.9%	12.6%	35.8%
ROW	-10.5%	5.3%	13.1%
Total	-3.6%	26.8%	22.4%

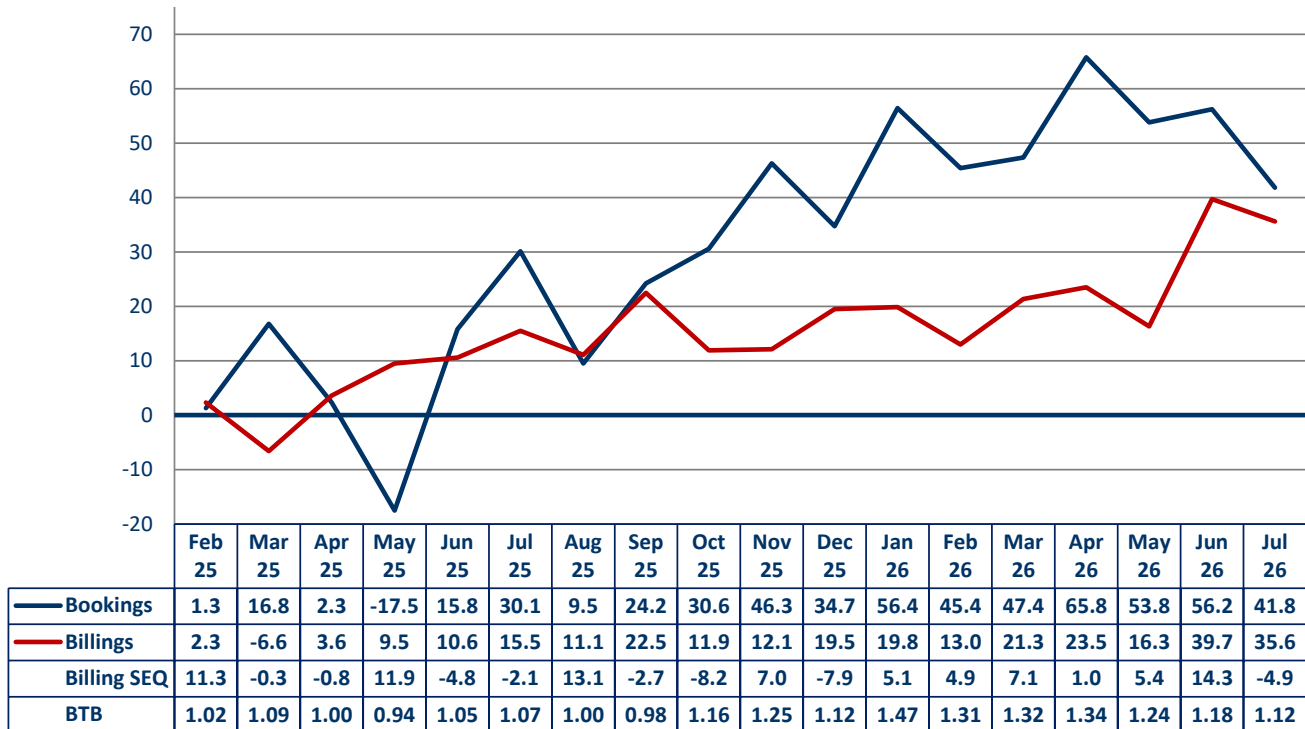
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- July connector sales increased by +26.8% compared to the same period last year, and +22.4% year-to-date.
- Sequentially, only two of the six regions showed an increase, with the greatest increase in China, where billings increased by +7.9%. The other growing region was Japan, where sales sequentially grew +2.1%. Of the four declining regions, the greatest decrease sequentially was in the Asia Pacific region at -19.9%, followed by the ROW region, where billings decreased -10.5%.
- Year-over-year, all six regions saw an increase, with the greatest increase, in the North American region where sales increased +35.6%, followed by the Chinese region, where sales increased +33.9%.

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**

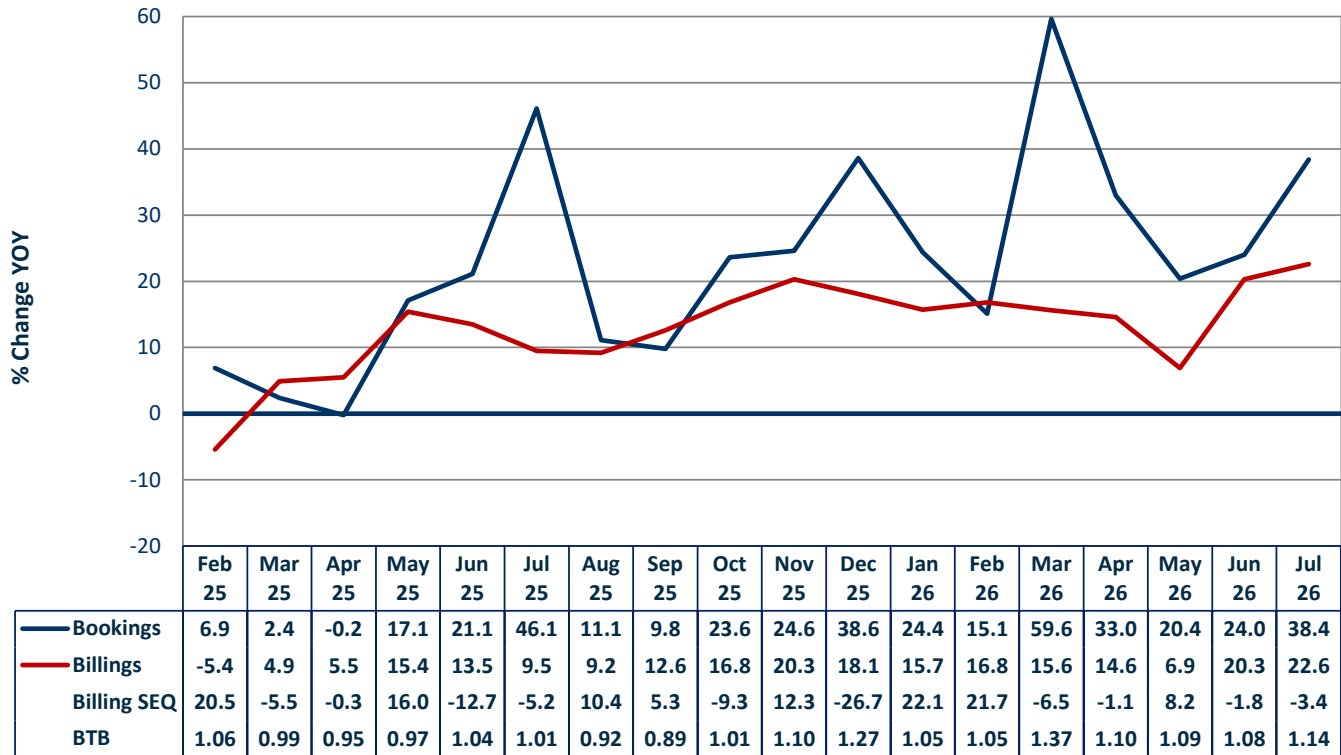


North America Performance

- Sales increased +35.6% year-over-year in July, while orders increased +41.8%, down from +56.2% in June. Sequentially, North American billings decreased -4.9%, down from +14.3% in June. The book-to-bill ratio decreased to 1.12, down from June's 1.18.
- The US unemployment rate "edged lower to 4.1% but was due largely to a further decline in those holding jobs or looking for work in July, according to CNBC". At the same time, the Consumer Price Index for All Urban Consumers increased 3.4%, after rising 3.5% for the year ending in June. Prices for energy increased 14.7%, while food prices increased 3.0%. Prices for items other than food and energy rose 2.5% over the year, according to the U.S. Bureau of Labor Statistics.
- New light-vehicle sales in July 2026 reached a SAAR of 16.3 million units, down 1.4% YOY. Sales for July were solid but finished slightly below expectations for a flat sales month YOY. The YTD SAAR through July 2026 totaled 16.0 million units, a decline of 2.2% compared to the same period last year," according to NADA.
- Consumer sentiment fell about 8% this August, ending two consecutive months of improvement. While views of personal finances saw only minor declines, expected business conditions sank 11% for the short run and 17% for the long run, according to the University of Michigan's Survey's of Consumers in July.

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



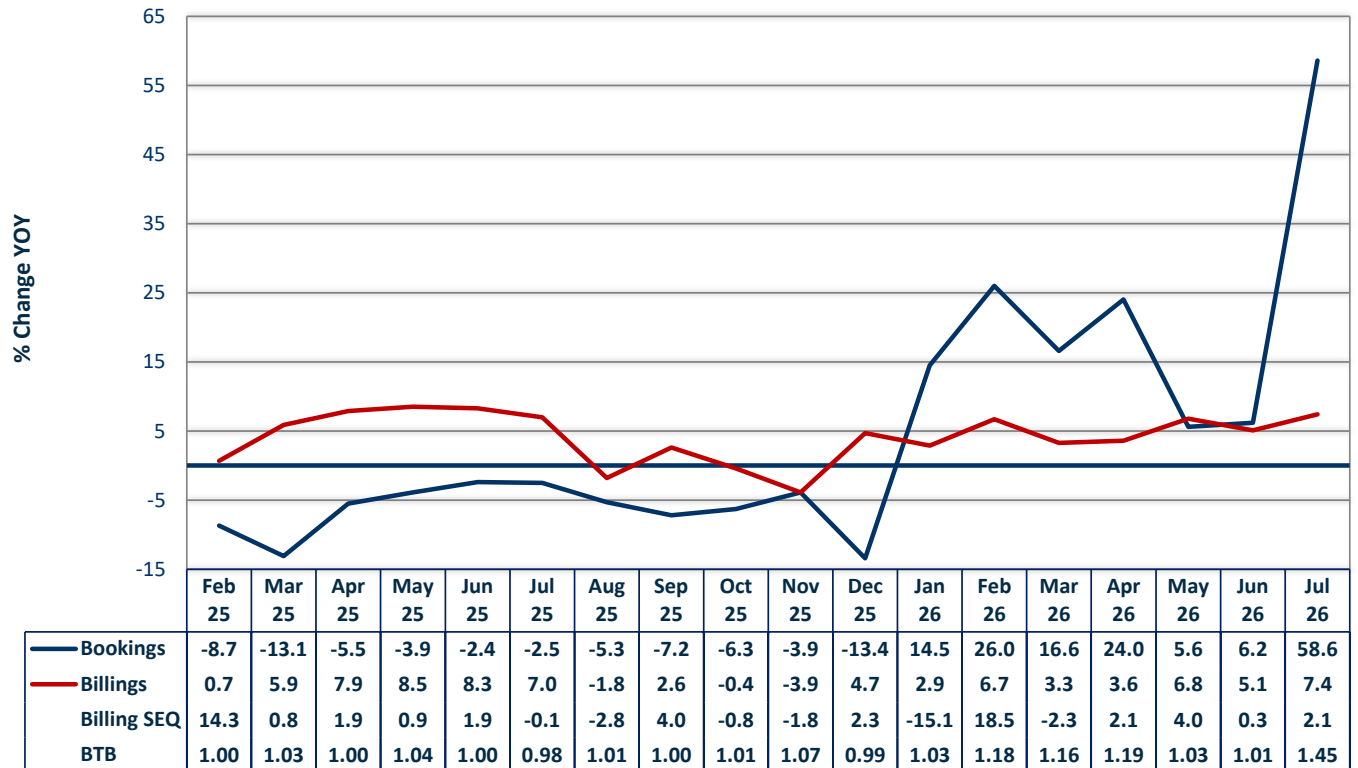
Europe Performance

- Bookings increased by +38.4% in July, up from +24.0 in June. Billings increased by +22.6%, up from +20.3% in June. Sequentially, sales decreased by -3.4%, down from -1.8% in June. The book-to-bill ratio was 1.14 up from 1.08 in June.
- "New EU car registrations rose by 5.7% during the first half of 2026, totaling nearly 5.9 million units. The market continued to benefit from robust consumer demand for a range of electrified technologies, driven primarily by market support measures. Hybrid-electric vehicles lead as the most popular powertrain choice among buyers, while battery-electric cars reached 20.7%. In addition, plug-in hybrids captured 9.8% of the EU market", according to ACEA.
- "In June* 2026, the euro area seasonally adjusted unemployment rate was 6.3%, stable compared with May 2026 as well as June 2025. The EU unemployment rate was 6.0% in June* 2026, also stable compared with May 2026 as well as June 2025", according to Eurostat.
- In July 2026, the Economic Sentiment Indicator (ESI) continued to recover in both the EU and the euro area, rising by +1.5 points in both areas, to 97.2 in the EU and 96.9 in the euro area. In addition, the Employment Expectations Indicator (EEI) improved considerably compared to June in both areas (EU: +3.3 points to 97.7, euro area: +3.5 points to 97.2)", according to European Commission.

**July 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**

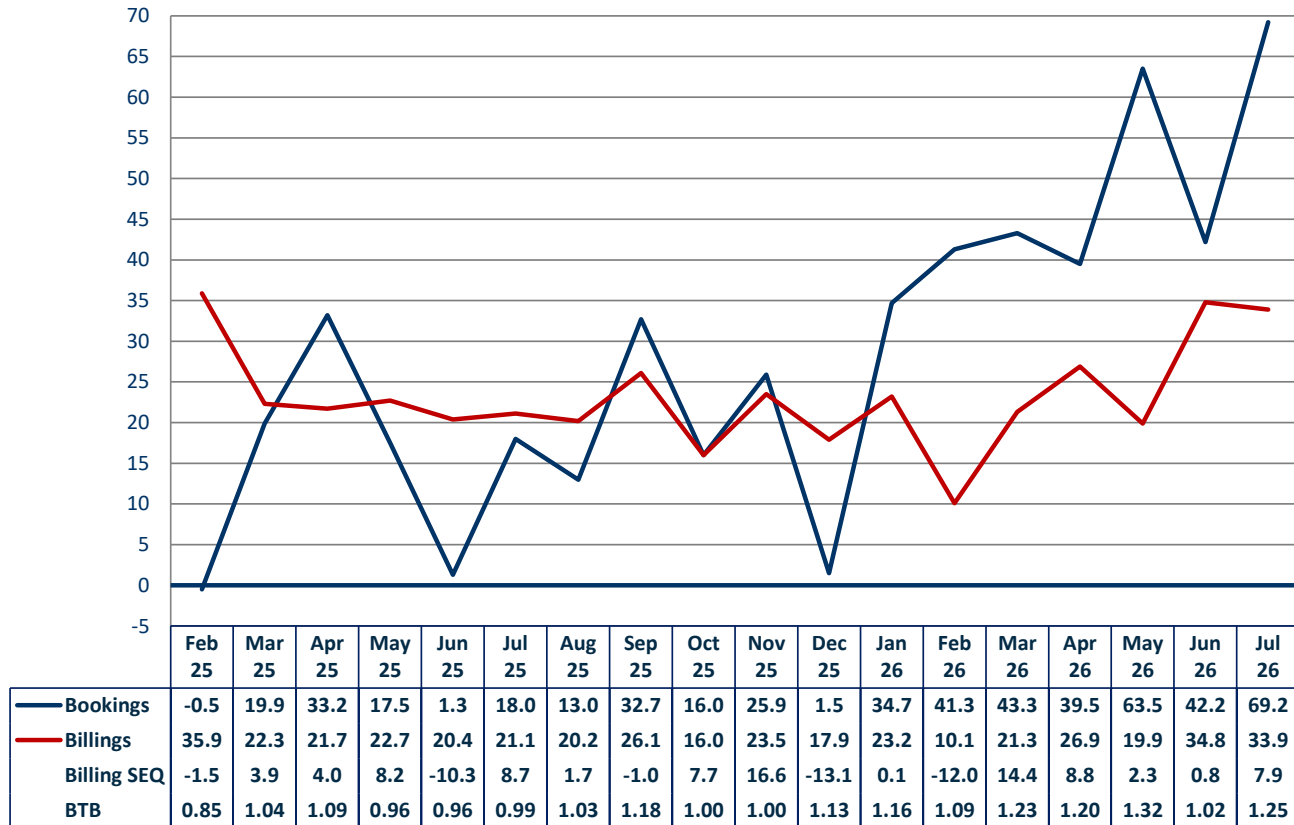


Japan Performance

- July's year-over-year bookings increased +58.6%, up from +6.2% in June, while billings increased +7.4%, up from +6.1% in June. Sequentially, sales increased +2.1%, up from +0.3% in June. Japan's book-to-bill ratio increased to 1.45, from 1.01 in June.
- "Core consumer prices in Tokyo's central wards increased 1.9% YoY in July 2026, following a 1.6% rise in the previous month and exceeding expectation of 1.7%", according to Trading Economics. Also, "Japan's S&P Global Composite PMI activity index rose to 53.4 in August 2026 from a final 52.7 in July, flash data showed, marking a 17-month expansion streak in private sector activity, driven by a sharp rebound in manufacturing output and faster services activity".
- "Japan's domestic new vehicle market continued to grow in July 2026, rising by 6.8% YOY to 417,163 units following a 3.6% decline to 390,512 units a year earlier, according to registration data released by the Japan Automobile Manufacturers Association (JAMA). Sales of passenger vehicles rose by 7.7% to 351,462 units, while truck sales increased by 1.4% to 64,481 units and sales of buses and coaches almost doubled to 1,220 units", according to Just Auto.
- "Japan's exports rose 23.2% YOY to a new record JPY 11,511.8 billion in July 2026, marking the strongest growth since Oct. 2022 and exceeding market expectations of 19.9%. The increase followed a 19.3% rise in June, extending the growth streak to 11 straight months", 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

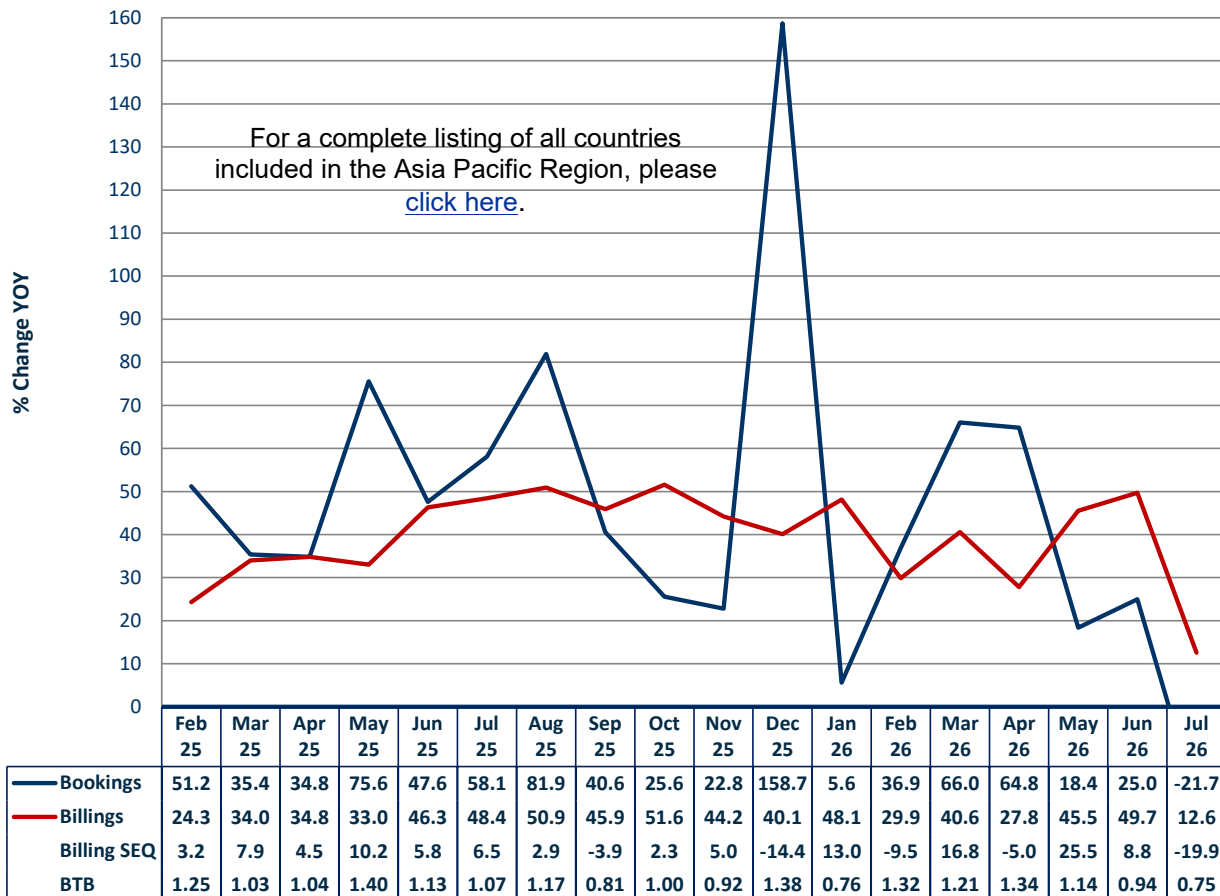


China Performance

- China's July sales grew +33.9% on a year-over-year basis. Bookings increased by +69.2% in July, while sequentially, sales increased by +7.9%. The book-to-bill increased to 1.25, up from 1.02 in June.
- "China's Consumer Price Index (CPI) increased by 0.5% year on year. Specifically, the price index in urban areas increased by 0.5% while that in rural areas increased by 0.4%. From January to July, on average, China's CPI increased by 0.9% year on year", according to National Bureau of Statistics of China
- "For the first time, China's new energy vehicles secured a more than 60% share of the country's overall automobile sales in July," according to China Daily. They also indicated, "Cumulative auto exports from January to July totaled 6.14 million units, among which NEV shipments reached 2.91 million units, more than doubling year-on-year".
- "China's official PMI dropped to 49.2 in July, falling from 50.3 in June and dropping below the 50-point threshold that separates growth from contraction. The non-manufacturing PMI also fell to 49.0, reflecting broad economic headwinds and weak domestic demand, according to Reuters.
- "China's surveyed urban unemployment rate rose to 5.2% in July 2026 from a one-year low of 5.0% in June, slightly above market expectations of 5.1%", according to Trading Economics.

Asia Pacific: The following chart displays the year-over-year percentage change in bookings and billings for the last 18 months. The monthly book-to-bill ratio is also displayed.

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

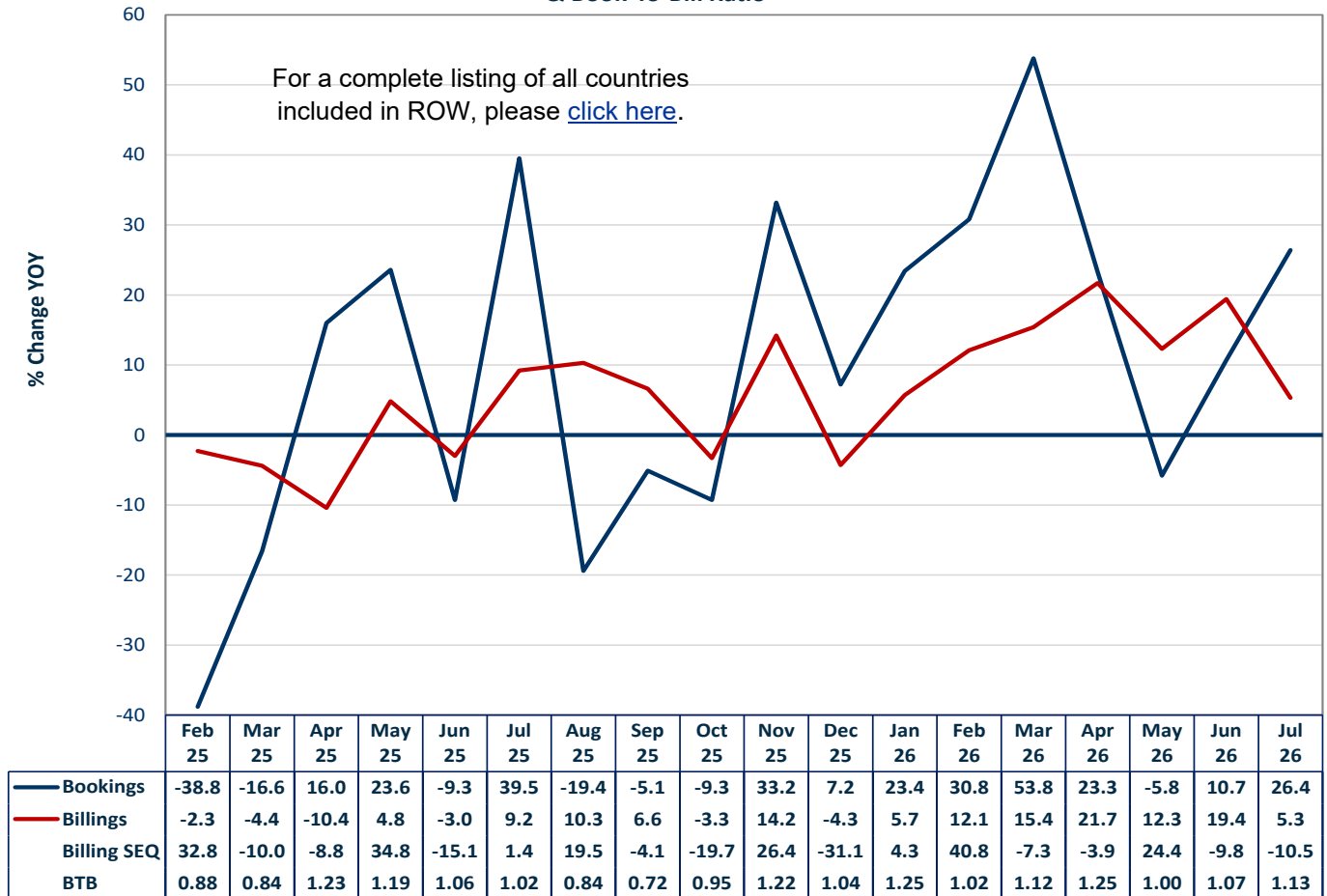


Asia Pacific Performance

- Year over year, July orders were down -21.7%, down from June's +25.0% increase. Billings increased by +12.6%, down from +49.7% in June. Sequentially, sales decreased by -19.9%, down from +8.8% in June. The book-to-bill ratio decreased to 0.75 in July, the lowest BTB since January, when the BTB was 0.76, and the second time this year the BTB was below one.
- "India's wholesale price inflation eased marginally to 9.78% in July 2026 from 9.87% in June, primarily helped by moderating energy prices despite sticky manufacturing and food pressures. The India WPI Food Index accelerated to a YOY inflation rate of 6.65% in July 2026, rising from 6.14% in June 2026%, according to SAHI. "India's HSBC Manufacturing PMI fell to 52.9 in August 2026 from 53.5 in July, making the weakest improvement in factory conditions since August 2021," according to Trading Economist.
- South Korea's exports in July surged by 62.8% year-on-year to \$98.89 billion, marking the second-highest monthly export figure on record driven by robust global demand for AI infrastructure and semiconductors," according to Trading Economist.

Rest of World: The following chart displays the year-over-year percentage change in bookings and billings for the last 18 months. The monthly book-to-bill ratio is also displayed.

ROW Bookings and Billings
Year-Over-Year Percentage Change
& Book-To-Bill Ratio



Rest of World Performance

- Orders increased by +26.4% in July, reflecting the strongest bookings since March, and keeping the region in positive territory. Billings increased by +5.3% year-over-year, down from +19.4% in June. Sequentially, sales decreased by -10.5%. The book-to-bill ratio was 1.13 up from 1.07 in June.
- "Brazil's annual inflation rate eased to 4.44% in July 2026, from 4.64% in June, in line with forecasts and moving back within the central bank's target range." Energy and fuel inflation slowed, easing to 4.43% from 5.28%, as global oil prices retreated from recent highs," according to Trading Economics.
- "South Africa's seasonally adjusted Absa Purchasing Managers' Index (PMI) dropped to 46.8 in July 2026 from 47.3 in June, contracting for a second consecutive month. Domestic demand and production continued to recover, with shorter supplier delivery times. Inventories declined further as firms remain uncertain that strong demand will persist. Nevertheless, peak inflationary pressures have likely passed, barring any further upsurge in global energy costs. Looking ahead, firms expect business conditions to weaken as renewed tensions in the Middle East push up oil prices, making firms question the durability of recent improvements in activity," 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	2.5% Up	1.2% Up	2.0% Steady	4.1% Down	N/A	N/A
Industrial Production Growth	1.1% Steady	0.1% Up	4.9% Up	4.5% Down	N/A	N/A
Manufacturing PMI*	55.6 Up	51.9 Steady	54.5 Steady	49.2 Down	N/A	N/A
Inflation Rate	3.4% Down	2.9% Up	1.9% Up	0.5% Down	N/A	N/A
Unemployment Rate	4.1% Steady	6.3% Up	2.3% Up	5.2% Up	N/A	N/A
Retail Sales Growth YOY	5.0% Up	1.6% Down	0.5% Down	0.6% Down	N/A	N/A
July Connector Sales	35.6%	22.6%	7.4%	33.9%	12.6%	5.3%
YTD Connector Sales	24.3%	15.9%	5.2%	24.5%	35.8%	13.1%
July Connector Orders	41.8%	38.4%	58.6%	69.2%	-21.7%	26.4%
YTD Connector Orders	52.2%	30.2%	21.7%	48.1%	25.6%	20.6%

* Purchasing Manager Index - Below 50 is contracting factory activity

Key Take Aways:

- In July, once again, YTD bookings were up in all regions in the double-digit range, with the greatest growth in North America at +52.2%, followed by China with YTD growth of +48.1%. 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.
- Unemployment appears to be rising again, with three of four regions showing an increase. This is probably part of the reason retail sales growth was also down in three of the four regions. Similar results are seen when reviewing inflation rates. For July two of the four regions saw inflation climb, with North America and China, experiencing a decrease.

The Industry Backlog Is 15.4 Weeks

July 2026 was another excellent month for the connector industry. Orders totaled \$12,102 million, up +38.7% over the same period in 2025. Sales were \$10,269 million, up +26.8%.

The industry shipped \$2,335 million per week in July. Assuming the same weekly shipments, the industry has 15.4 weeks of backlog (ending backlog \$36,045 million divided by \$2,335 million).

Industry Backlog

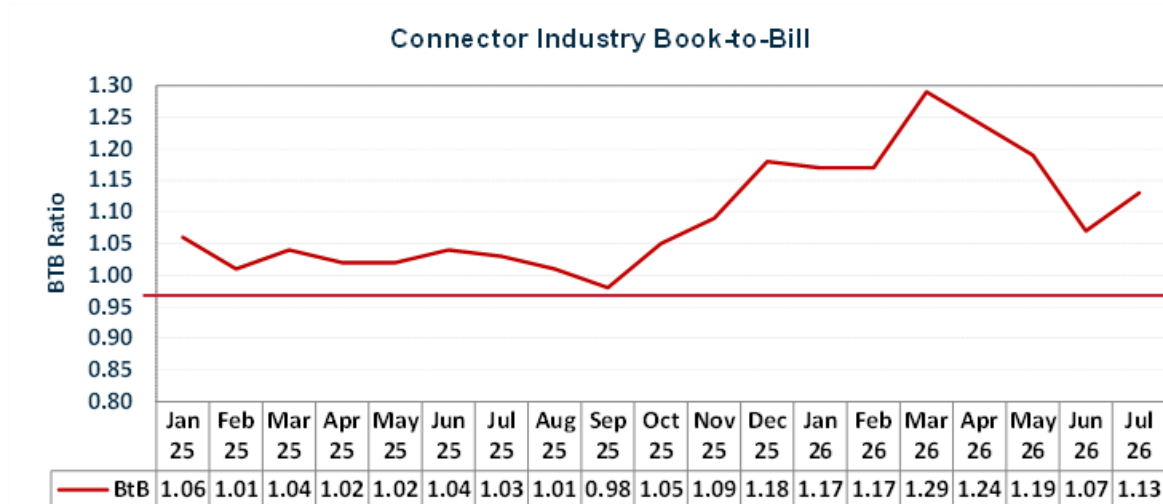
	Full Year 2025	July 2026
BtB Ratio	1.00	1.13
Beginning Backlog	\$21,287	\$24,067
YTD Bookings	\$101,868	\$79,602
YTD Billings	\$99,165	\$67,024
Ending Backlog	\$24,067	\$36,045
Backlog in Weeks	12.6	15.4

\$ 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 has increased \$12.0 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 17 out of the 19 months.



Connector Sales & Order Trends

Connector orders have exhibited a double-digit increase for 14 consecutive months. Sales have shown a double-digit increase for the last 16 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%	21.4%
May	37.8%	17.6%
June	36.9%	32.8%
July	38.7%	26.8%
August		
September		
October		
November		
December		
Year-to-Date	39.9%	22.4%

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 28 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 +39.9% through July 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 July 2025 versus July 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	0.8548	0.8757	-2.4%
Yuan	7.1718	6.7784	5.8%
Yen	146.8150	162.4888	-9.6%

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

**Industry Sales Performance
July 2026
USD-vs-Local Currencies**

Region	U.S.\$	Local Currency
North America	35.6%	35.6%
Europe	22.6%	19.7%
Japan	7.4%	-2.9%
China	33.9%	41.6%
Asia Pacific	12.6%	12.6%
ROW	5.3%	5.3%
World	26.8%	27.5%

Connector sales in July of 2026 increased +27.5% when measured in local currencies, versus an increase of +26.8% in US dollars.

2026 Outlook: Historical Analysis

There are several ways to calculate the anticipated outcome for a total year's sales. One way is to look at average monthly sales. Since 2020 (six years), July sales averaged 8.13% of full year sales. World connector sales in July were \$10,269 million. Assuming the six-year average is repeated, 2026 full year sales would be \$126,310 million. This is a +27.5% increase over 2025 sales of \$99,088 million.

Another approach is to analysis year-to-date sales. On average, sales through July represented 58% of full-year sales over the six-year period, 2020 through 2025. Should history repeat, 2026 sales would be \$115,560 million for an increase of +16.6% (July YTD sales \$67,025 million divided by 58%).

This provides us with a range of possible sales outcomes in 2026.

Historical Sales Analysis

Methodology	2025 Sales	2026 Sales	Percent Growth
July Monthly Sales Average 8.13%	\$99,088	\$126,310	27.5%
YTD July as % of Total Sales 58.0%	\$99,088	\$115,560	16.6%

\$ Millions

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2026 Outlook: By Region and Quarterly

Bishop has recently re-evaluated their 2026 forecast based on updated information. The following is our most recent forecast, by region, for the remainder of 2026.

Connector Sales by Region 2025 and 2026 with Percent Change

Region	2025	2026	Percent Growth
North America	\$21,975.6	\$25,643.5	16.7%
Europe	\$18,874.1	\$21,110.9	11.9%
Japan	\$4,154.3	\$4,284.6	3.1%
China	\$32,841.8	\$40,105.0	22.1%
Asia Pacific	\$17,882.7	\$24,174.0	35.2%
ROW	\$3,436.1	\$3,799.5	10.6%
Total World	\$99,164.6	\$119,117.5	20.1%

\$ Millions

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From a quarterly perspective, Bishop anticipates connector sales in the last two quarter of 2026 to perform as indicated below. These two tables predict the connector industry to grow +20.1% in 2026, for total sales of over \$119 billion.

Quarter	2025 Actual	YOY Change	2026 Forecast	YOY Change
1Q	\$22,587	6.1%	\$26,803	18.7%
2Q	\$23,950	13.8%	\$29,820	24.5%
3Q	\$26,701	19.5%	\$32,651	22.3%
4Q	\$25,927	18.9%	\$29,844	15.1%
Total	\$99,165	14.7%	\$119,118	20.1%

\$ Millions

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Bishop will be publishing an updated 5-year forecast report by region and market sector in late September. Look for additional information on how to obtain your personal copy of this report in the upcoming weeks.

Significant Events

July 2026 News

Compal Says PC Shipments to Decline

Contract electronics maker Compal Electronics Inc said PC shipments are expected to fall by 15 to 17 percent year-on-year in the second half of the year, as rising memory chip prices weigh on consumer demand.

Compal shipped 12.1 million PCs in the first half, down 14.2 percent from the same period last year, company data showed.

Compal expects full-year shipments to decline by a mid-teens percentage from last year's 28 million units, Compal president Anthony Peter Bonadero told an online earnings conference.

Despite replacement demand for Windows 10, higher component costs are making enterprise customers and consumers more cautious about spending in the second half, Bonadero said.

Even so, Compal's PC unit profitability has remained stable, thanks to a higher production share of artificial intelligence (AI) PCs and commercial PCs, increasing selling prices and improving operational efficiency, he said.

AI PCs account for about 50 percent of Compal's PC shipments and the ratio is expected to rise as the market enters an AI PC refresh cycle, he said.

The firm also expects its server business to remain robust, with server revenue projected to grow by a high-double-digit percentage sequentially this quarter, he said.

Server revenue is on track to account for 10 percent of total revenue this year, he said, adding that AI servers accounted for about 70 percent of Compal's total server revenue last quarter.

Compal's AI server portfolio consists mainly of Nvidia Corp's B300-based systems, most of which have moved into so-called "Level 10" production, Bonadero said.

The company plans to begin producing larger AI server racks in the first quarter of next year, he said.

Server orders last quarter were mainly from new cloud customers, with the momentum expected to continue through the second half, he said.

As new capacity in Taiwan and Texas comes online, Compal plans to diversify its customer base next year to include tier-1 cloud service providers and at least one major enterprise customer, he added.

Compal's net profit last quarter grew 59 percent quarter-on-quarter and 549 percent year-on-year to NT\$3.13 billion (US\$97.3 million).

The Memory Crisis is Killing off Sub-\$100 Smartphones as US Sales Plunge 64%

Buying a smartphone for under \$100 could soon become something you used to be able to do. According to the latest sales figures, this segment declined by 64% YoY in the second quarter – and there are no prizes for guessing why.

Counterpoint Research writes that US smartphone sales fell by 5% YoY in Q2 2026, with memory price increases the main culprit alongside other macroeconomic factors weakening consumer demand.

The market research firm writes that rising RAM demand from hyperscalers continues to drive up memory costs. Meanwhile, higher prices for other goods stemming from conflict in the Middle East are reducing consumers' purchasing power for smartphones and other electronics.

The problem is especially bad for smaller brands, several of which, including HMD, have left the US market or downsized operations. As a result, sub-\$100 smartphone sales declined 64% as OEMs either stopped shipping these devices or were forced to increase prices to offset increased memory costs.

Motorola's price increases have seen its G-series phones moved into the previously sparse \$200 – \$299 bracket, helping sales in that segment grow by almost 200% YoY and tripling its share of the US market.

The squeeze is unlikely to end in the current quarter. Counterpoint expects average smartphone selling prices to continue rising in Q3, when Apple is also expected to increase prices for its iPhone 18 series. Earlier this year, CEO Tim Cook confirmed that price hikes across Apple's product lineup were becoming unavoidable, while one estimate suggested base iPhones could increase by more than \$200. Apple has since raised prices on all of its MacBooks and iPads.

This isn't the first time we've heard of a budget electronics category facing extinction because of the memory crunch. In March, Gartner predicted that the rising cost of RAM and NAND could result in the sub-\$500 PC market disappearing by 2028.

It was recently reported that global sales of smartphones costing less than \$400 are expected to fall 22% this year. Omdia found that memory represented nearly 60% of the bill of materials for these phones in Q1, rising above 64% for devices priced below \$99.

Hon Hai Subsidiary Foxconn Assembly Takes Full Control of Q-Edge Corporation

Hon Hai Precision Industry's subsidiary, Foxconn Assembly Holding Corp., has approved the acquisition of an additional 18,800,000 shares of Q-Edge Corporation at USD 10 per share, for a total of USD 188 million. The transaction, completed via private capital and approved by the board, is classified as a related-party deal connected to a capital increase at the subsidiary.

Following this purchase, Foxconn Assembly Holding's total stake in Q-Edge rises to 22,620,000 shares, representing 100% ownership with no restrictions on rights, and is designated as a long-term investment.

Total investment in Vietnam by Foxconn expected to hit \$5bln

Foxconn plans to invest an additional \$265 million in its manufacturing operations in Vietnam as part of its long-term investment strategy, according to a recent filing by the Taiwanese technology giant with the Taiwan Stock Exchange (TWSE), as cited by TNGlobal.

The additional capital will be injected into Foxconn's Vietnamese subsidiaries through the issuance of new shares.

The largest investment, worth \$117 million, will go to Competition Team Technology (Vietnam) Co., Ltd., which manufactures televisions, components and other electronic products. Following the transaction, Hon Hai Precision Industry will hold a 61.55% stake in the company, while Foxconn Singapore Pte Ltd will own the remaining 38.45%.

Another \$114 million will be invested in Foxconn EV Energy & Component (Vietnam) Co., Ltd., which manufactures components and energy-related products for electric vehicles. Hon Hai will directly hold a 23.53% stake, while Foxconn Singapore will own 76.47%.

The third capital increase, worth around \$33 million, will be made at FuKang Technology Co., Ltd., a Foxconn manufacturing facility in Vietnam. The company specializes in producing tablets for Apple and other electronic products.

In a filing dated August 18, Foxconn said Foxconn Singapore had acquired additional shares in FuKang Technology worth \$358.4 million between October 2025 and August 2026, raising its ownership to 100%. Its total investment in the company has reached \$710.4 million.

With the newly announced investments, Foxconn's total investment in Vietnam is expected to approach \$5 billion.

Export Order Growth Hits 61.9 Percent

AI BOOM: Orders for ICT products increased 89.5 percent, and electronic products climbed 71.7 percent, while orders for optoelectronic products decreased 10.6 percent

Export orders last month rose 61.9 percent year-on-year to a record US\$97.94 billion, marking the 18th consecutive month of increases, the Ministry of Economic Affairs said yesterday.

The expansion accelerated from the 59.4 percent annual increase in June and exceeded the ministry's forecast of a 54.5 to 57.8 percent increase for last month. It also beat DBS Bank Ltd's estimate of a 56.6 percent rise.

Export orders — including those received by Taiwanese firms and produced domestically or abroad — are an indicator of product and component shipments to overseas markets ahead of customs clearance by one to three months.

Last month, 45.6 percent of all orders received by firms were produced overseas, down 0.6 percentage points from a year earlier, as makers of information and communications technology (ICT) products boosted domestic production, the ministry said in a report.

The stronger-than-expected performance last month reinforces the view that demand for applications related to artificial intelligence (AI), high-performance computing and cloud services remains strong, supporting growth across related supply chains, the ministry said.

Orders for ICT products (including servers) increased 89.5 percent, and electronic products (including thermal components) climbed 71.7 percent year-on-year last month, benefiting from the rapid development of AI applications, the ministry said.

However, orders for optoelectronic products decreased 10.6 percent due to weak demand for flat panels, it said.

Traditional industries benefitted from semiconductor firms' capacity expansion and rising copper and steel demand amid the AI boom. Orders for machinery and base metals increased 31.3 percent and 24.3 percent respectively, the ministry said.

Orders for chemicals edged up 0.2 percent due to a high comparison base last year, and those for plastic and rubber products rose 3.2 percent on inventory replenishment demand, it said.

By destination, orders last month from the US registered the largest annual increase of 88.9 percent, followed by increases of 61.1 percent from ASEAN and 47.2 percent from China (including Hong Kong), the ministry said.

Orders from Japan grew 37.1 percent and those from Europe were up 33.1 percent, it said.

Spurred by last month's strong performance, cumulative orders in the first seven months of the year grew 52.5 percent to a record US\$602.03 billion, the ministry said.

Last month's order growth is expected to carry on into this month, as the ministry-compiled diffusion index of export orders — a gauge of manufacturers' expectations on orders for the following month — surpassed the neutral level to 51.3, suggesting that firms remain confident about the business outlook as August marks the start of the peak season for consumer electronics in the second half of the year.

As a result, orders are forecast to increase 61.4 to 64.8 percent year-on-year to between US\$97 billion and US\$99 billion this month, and the figure could top US\$100 billion next month if demand for smartphones proves strong, it said.

Foxconn Ramps Up Urgent Hiring for iPhone 18 Mass Production

Foxconn is urgently recruiting workers at its Zhengzhou and Shenzhen manufacturing bases as it races toward mass production of Apple's iPhone 18. At the Zhengzhou A Business Group, the sign-on rebate for employees who complete three months on the job has been raised from 6,000 yuan in July to 7,800 yuan, while hourly wages have climbed from 26 yuan to 28 yuan.

Shenzhen hourly wages also rose from 25 yuan to 26 yuan. The rebate uses a tiered retention mechanism requiring a full 90 days of service to collect the maximum amount.

Compared with last year's iPhone 17 production-season peak rebates of 9,600 to 9,800 yuan, this year's incentives are notably more conservative. The shift is tied to Apple's adjusted launch strategy: the September 9 event is expected to feature only the iPhone 18 Pro, Pro Max, and the first foldable iPhone, with the standard model pushed to spring 2027. Foxconn has not disclosed total hiring targets, but the labor gap is real, and rebate policies may be adjusted dynamically.

Tesla Semiconductor Factory to be World's Biggest Building

The foundations have been laid for what has been described as the world's largest building, according to Elon Musk — the 100-million-sq-ft Terafab project, a semiconductor factory in Texas being built on behalf of Space X and Tesla.

If completed at the scale promised, the Terafab would beat the world's biggest building now, the AvtoVAZ vehicle manufacturing plant in Tolyatti, Russia, which measures 65 million sq ft.

Tesla currently has a 10-million-sq-ft gigafactory in Texas, completed in 2022.

A press release from Texas governor Greg Abbott states that the first phase of the Terafab will cost \$16.7bn and will consolidate manufacturing, packaging and testing of advanced logic and memory devices.

The goal is to increase semiconductor manufacturing to meet future chip needs. 3,000 people will be employed on site.

Musk said on X (formerly Twitter) that the facility would be the world's biggest building and the "most valuable".

Future phases are currently unpriced. No contractor has been named on the project.

Water from the Gibbons Creek Reservoir water will be used at the Terafab.

The future demand for chips by SpaceX and Tesla is, **according** to a press release from Space X, predicted to exceed 1 terawatt of compute, which would eclipse the current global supply.

AI Growth Has Electronics Industry CEOs Bullish on Near Future

The race to build infrastructure for AI data centers has proven to be a significant boon for the electronics industry, reminiscent of the late 1990s Internet boom that drove unprecedented demand for servers. Strong demand for GPUs and CPUs used to process data is leading the charge, alongside robust demand for memory and other critical data center components.

Over the past month, major electronics companies announced generally strong results for the second calendar quarter of 2026, citing robust sales and continued investment in production capacity for AI applications. Demand has also remained strong in other sectors, including automotive electronics.

However, the rapid growth in AI is not without challenges. Several companies noted difficulties meeting robust customer demand, with production capacity strained and supply shortages emerging. Memory, for instance, is increasingly under allocation as suppliers transition to producing high-bandwidth memory (HBM), unfortunately at the expense of memory for consumer and automotive applications.

Apple Will Begin Assembling Mac Minis at Foxconn's Houston Plant Later This Year

A new Mac Mini assembly line at Foxconn's Houston facility is expected to begin production later this year, expanding Apple's US manufacturing footprint for AI-related hardware. The project is part of Apple's effort to increase domestic production while continuing to rely on contract manufacturers and an international supply chain.

The line will operate in a new 170,000-square-foot space at the plant, which already makes AI servers for Apple. Foxconn is funding the assembly-line buildout, while Apple has committed to purchasing the products made there.

The Mac Mini has seen stronger demand over the past year, particularly among customers using the compact desktop to run AI models at home. Its planned Houston production also comes after Apple discontinued the Mac Pro, which was assembled in the US at a Flextronics plant that President Trump visited with Apple CEO Tim Cook in 2019.

Cook and Commerce Secretary Howard Lutnick toured the Houston site last week. The visit included a new manufacturing school that Apple is opening to provide hands-on training for small and midsize US companies. Apple previously launched a classroom-based manufacturing program in Detroit.

"Advanced manufacturing is where the puck is going," Lutnick told workers taking an Apple manufacturing course. "The problem is we need to train Americans."

Cook said Apple's US investment plans reflect its broader commitment to domestic production. "We believe in the promise of this nation and we're proud to put our money where our mouth is," he said in a speech.

Apple's investment strategy relies heavily on its purchasing power rather than on building and owning factories. The company's capital spending remains far below that of Amazon, Microsoft, and Google, which have made major investments in AI infrastructure and semiconductor capacity. Apple's total capital expenditures since 2023 are less than what each of those companies spent in its most recent quarter.

That model is evident in Houston. Foxconn is paying to build the production lines, while Apple is supporting the project through product orders. The arrangement preserves Apple's long-standing reliance on manufacturing partners while allowing it to use its supply-chain scale to influence where production and component sourcing take place.

Apple has made similar commitments in semiconductors. The company is among the businesses that have agreed to buy chip wafers from TSMC's Arizona plant, a project expected to cost more than \$200 billion. Apple has also reached a preliminary agreement for Intel to manufacture some of its device chips and said it plans to spend \$30 billion on US-made chips from Broadcom.

The company has pledged to invest \$600 billion in the US over four years. The total includes spending already planned for its American business, including employee pay, retail and corporate operations, and purchases from domestic suppliers.

The administration has encouraged Apple to expand its US manufacturing operations. President Trump has pressed the company to make iPhones domestically, but Apple has not announced such plans. Instead, it is expanding iPhone assembly in India.

The Houston event was among Cook's final public appearances as Apple's chief executive. He is expected to become chairman next month, with John Ternus, Apple's longtime hardware engineering chief, expected to succeed him as CEO.

OpenAI 'will be a public company in 2027' or Sooner, CFO Friar Tells Employees

OpenAI CFO Sarah Friar told employees during an all-hands meeting that the artificial intelligence lab "will be a public company in 2027," but that it could make its public market debut sooner if "our business continues to inflect."

"The IPO is not a finish line, it is a milestone, another fundraiser," Friar told employees, according to two sources familiar with her comments who asked to remain anonymous because they were not authorized to speak publicly. "We raised \$122 billion in March, and that gives us flexibility."

OpenAI confidentially filed its IPO prospectus with the Securities and Exchange Commission in June, but it has not publicly disclosed when it plans to debut. The company's chief rival, Anthropic, has also confidentially filed its prospectus with regulators, and it's been holding early meetings to test the waters with potential investors, as CNBC previously reported.

OpenAI is under pressure to justify its \$852 billion valuation ahead of its IPO, and investors are eager to get a more detailed look into the company's finances.

During the all-hands meeting on Wednesday, Friar showed employees a series of slides that said OpenAI's revenue run rate is up 35% quarter to date, its enterprise revenue run rate is up 50% quarter to date and its AI coding and work product has hit 20 million weekly active users.

OpenAI told investors it generated \$6.7 billion in revenue for the second quarter, up 18% from the first quarter, according to a report from the Wall Street Journal late Wednesday. The company's annualized revenue run rate recently topped \$40 billion, as CNBC previously reported.

Anthropic, meanwhile, told investors over the weekend that its annualized revenue run rate hit \$65 billion at the end of July, a sevenfold increase from a year ago. The company also shared a preliminary revenue figure of \$11.5 billion for the second quarter, as CNBC previously reported.

Intel at a Memory Crossroads, Again

Intel, a semiconductor memory pioneer that transformed into a CPU behemoth, is heeding another return to the memory world, which itself has transformed from a highly cyclical commodity business to an AI gold mine. Intel CEO Lip-Bu Tan telegraphed this move in the TechSurge podcast hosted by Michael Marks.

The crux of Tan's talks was that memory chips are no longer a commodity and that current memory architectures leave plenty of room for innovation. That's understandable because AI has profoundly changed the memory chip market. Moreover, industry watchers believe that memory shortages will persist beyond 2030.

Tan also hinted at Intel exploring ways to stack memory on top of a CPU. "Intel isn't just looking at building CPUs with new architectures but is also working on embedding CPUs with stacked DRAM capabilities." Take the case of Intel's Lunar Lake platform, which features memory in the same package as the CPU.

Despite all this memory teasing and talk of pet projects, Tan didn't unfold any definitive plan. It's not even clear whether these pet projects for memory architecture innovation are Intel initiatives or whether they fall under his personal investments through Walden International, the venture capital firm he founded and still chairs.

Nevertheless, Tan's "memory talk" has been making waves across the industry. It has also triggered a trip to memory lane of Intel's long journey in this industry. Below is a sneak peek at Intel's love-hate relationship with memory semiconductors spanning half a century.

Apple's First Foldable Could Reshape its Entire iPhone Launch

Apple will allegedly focus on producing and shipping its three most high-end 2026 models and defer the regular iPhone 18 to the first half of 2027 rather than releasing all new iPhone models at the same time.

But if the scheme works, it would disclose something big about Apple's intentions. With memory chip and materials costs rising, the corporation seems ready to shift scarce components and manufacturing muscle to the phones, most likely to create higher revenue and profit per device.

The lineup is said to include Apple's first foldable iPhone and two premium non-folding models with improved cameras and larger screens. The gadgets would anchor the company's flagship launch in the second half of 2026, with the conventional iPhone 18 coming months later.

For investors, that might mean that the next iPhone cycle is less about maximizing unit numbers and more on optimizing the economics of every device Apple can create.

Self-Driving Trucks Are Officially Testing on California Highways

Aurora Innovation and Kodiak AI, two companies developing self-driving trucks, have received permits from the California Department of Motor Vehicles to test their autonomous vehicle technology on public roads. And Kodiak has already started.

Kodiak said it is starting with a handful of test trucks in California, primarily around its Mountain View office.

Both companies applied for testing permits this spring under updated rules approved by the California DMV, the agency that regulates autonomous vehicles in the state. Those rules, approved April 28, lifted a ban on driverless vehicles weighing over 10,000 pounds from testing on public roads and provided a regulatory path for companies to test, and eventually deploy, autonomous heavy-duty vehicles.

Kodiak and Aurora met the DMV's permitting criteria, including safety, insurance, vehicle registration, safety driver qualification, and other requirements, according to the agency. The testing permits require a human safety operator to be behind the wheel and prohibit companies from operating on roads where the posted speed limit is 25 miles per hour or less, unless they are on a "direct route" between destinations.

Despite those restrictions, the prospect of self-driving trucks on California's highways continues to fuel opposition.

Last week, Teamsters California sued the state's DMV, alleging that the agency circumvented laws requiring it to study and publicly disclose the possible economic impacts of allowing self-driving trucks on public roads. The lawsuit, filed in the state's Superior Court in Alameda County, also accused the DMV of failing to consider the safety risks to motorists.

For autonomous vehicle developers, the new rules allow them to test and eventually deploy in their home territories.

Aurora and Kodiak are both based in California, but until recently focused their testing and deployment activities in Texas because of their home-state's ban on autonomous heavy-duty trucks. Aurora launched a self-driving truck service in Texas in May 2025, starting with a Dallas-to-Houston route. The company has added more routes since, including between Fort Worth and El Paso, El Paso and Phoenix, Fort Worth and Phoenix, and Laredo and Dallas.

Kodiak started commercial deliveries using its self-driving trucks in 2019, although the company has yet to remove the human safety operator in its on-highway operations. Kodiak expects to remove the human safety operator by the end of the year. However, it has gone driverless in off-highway environments. The company launched commercial driverless truck operations in January 2025 in an off-road environment in West Texas' remote Permian Basin.



Bishop & Associates has just released a new ten-chapter research report providing a comprehensive analysis of the world's Top 100 Electronic Connector Manufacturers. This new report furnishes detailed statistics that benchmark the leading connector manufacturers by 2024/2025 total sales, sales by end-use equipment market, sales by product category, and sales by region. All manufacturers are exhibited by 2025 sales and are ranked by region of the world with percentage year-to-year change. This report provides all the key data needed to analyze the sales performance of each of the top 100 worldwide electronic connector suppliers.

The world's top 100 connector manufacturers recorded shipments of \$81.386 billion in 2025. This represented 82.1% of the worldwide connector market, up from 81.0% in 2024. The balance of the connector industry had shipments of \$17.783 billion in 2025 and represented 17.9% of the total market.

Over the last two decades, we have identified more than 750 connector manufacturers, many of whom have been acquired by larger companies or consolidated to form new connector companies. In fact, if you were to review the list of top 100 connector companies in 2000 with the list of top 100 connector companies in 2025, you would see that a large percentage of the companies listed in 2000 were acquired by other companies. In fact, in just the last several years, names like AirBorn, CONEC, ERNI, Positronic, Carlisle Interconnect, and Winchester, all at one time, top 100 place holders have been acquired. It doesn't appear this consolidation will end anytime soon either. This will be the last year that CommScope #19, Smiths Interconnect #35, or Omnetics #90 will be represented as standalone companies, as all have been acquired by other top 100 companies.

These consolidations not only allow new companies to join the elite list of top 100 connector manufacturers, but they also allow us to see the change in market sector penetration and product type expansion these companies have brought to the marketplace. It allows Bishop to provide their customers with a consolidated list of companies, and the products and markets sectors they focus on, all great information when someone is seeking the best company to support their requirements.

With so many connector companies, finding the right one is not always an easy task. Allow us to make that job much easier. Obtain your own copy of the Top 100 Connector Manufacturers and evaluate and explore the 100 connector companies that make up over 80% of the connector manufacturing industry. For additional information on how to obtain a copy of this report, or to obtain a sample, please click [here](#).

The table on the following page shows percent of sales for the top 100 connector manufacturers, and all other connector manufacturers by geographic region.

Top 100 by Geographic Region - 2025 Sales

Region	1 - 100 Sales	All Other Sales	Total World
North America	XX.X%	X.X%	XX.X%
Europe	XX.X%	X.X%	XX.X%
Japan	3.7%	0.4%	4.2%
China	XX.X%	X.X%	XX.X%
Asia Pacific	XX.X%	X.X%	XX.X%
ROW	2.2%	1.3%	3.5%
Total World	82.1%	17.9%	100.0%

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