

June 2025 Industry Pulse Survey Delivers Stunning Results

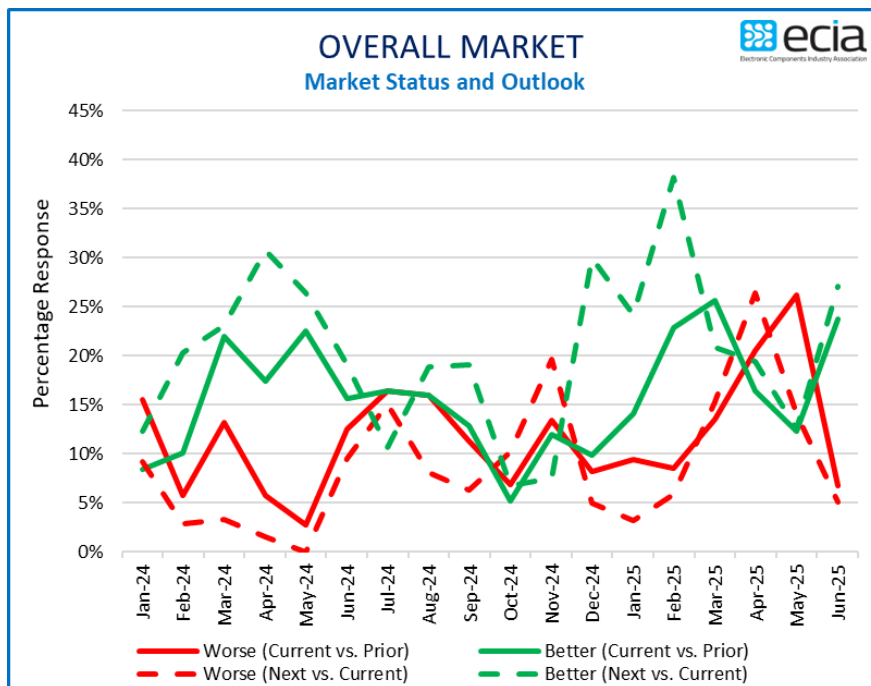
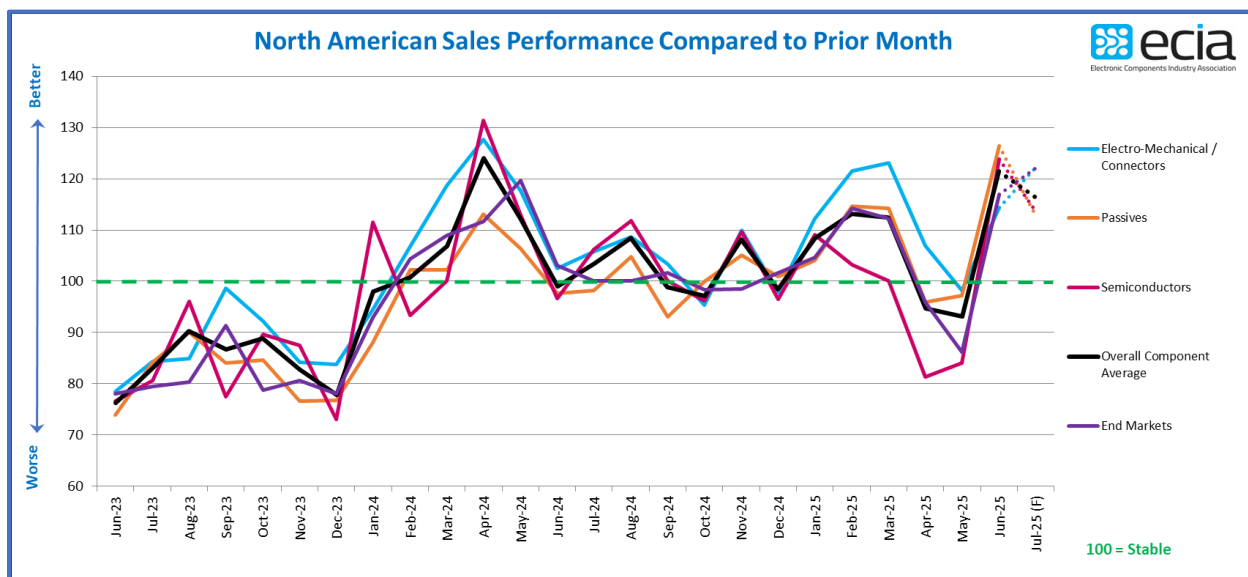
ECIA's Industry Pulse: Electronic Component Trends and Sentiment June 2025 Results

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An energetic leap of 28.4 points in the overall average component industry sentiment between May and June comes as a shock compared to expectations from the May Industry Pulse survey. The average component index score of 121.5 is 27.5 points above the expected score of 98.4 in June. Again, the chaotic world of tariffs is the primary determinant of sales expectations. There were some encouraging signals regarding possible agreements between the US and China and the US and EU during June that may have contributed to this burst of enthusiasm. Also, it is likely that the effort to make purchases prior to the imposition of tariffs at some point in the second half of the year (a continually moving deadline) is reshaping the typical annual sales pattern to skew it more heavily to the first half of the year. As it appears that tariffs will not be imposed until after July, the index outlook for July dips only slightly to 116.5. Semiconductors saw the most dramatic upward swing with the index soaring almost 40 points from May to June reaching 123.8. Passive Components delivered the highest June index score at 126.3, a 29.2 jump. Electro-Mechanical/Connector Components saw a healthy boost to 114.4 in June, coming in at an unusual third place in the component scores. The June Industry Pulse results reveal that the continued erratic and unpredictable tariff activity and communication has resulted in a highly unstable sales environment. While such elevated numbers for June and the July outlook may be reason to cheer, it would be more prudent to continue in crisis management mode for the foreseeable future.

Manufacturer Representatives delivered the most exuberant scores for June sales sentiment in every component category. They are followed by Manufacturers with very robust reports with scores above 100 in every category but Electro-Mechanical. Distributors also saw a strong jump in their June scores but with a more conservative view than the other groups. The overall end-market jump in the index score actually passed the overall component index score increase coming in at 116.9 in June, a 30.8 leap. In addition, the end-market score is projected to improve again in July to nearly match the Electro-Mechanical\Connector score of 122.3. Every individual end-market score registers solidly above the 100-point threshold with the exception of Mobile Phones. The broad-based positive results for June and July reinforces the very bright near-term picture these results portray. Again, long-term caution is still wise.

The lead time scores show a highly stable environment. Those participants reporting negative lead times went from very few in May to zero in June. This is a first for the Industry Pulse survey. Reports of increasing lead times also declined in June. The average score for stable lead times hit 91% of reports in June. A healthy supply chain inventory and lead time situation will be a valuable asset amidst the current geopolitical instability.



The ECST survey provides highly valuable and detailed visibility on industry expectations in the near-term through the monthly and quarterly surveys. This “immediate” perspective is helpful to participants up and down the electronics components supply chain. In the long-term, ECIA shares in the optimism for the future as the continued introduction and market adoption of exciting innovative technologies should motivate both corporate and consumer demand for next-generation products over the long term.

The complete ECIA Electronic Component Sales Trends (ECST) Report is delivered to all ECIA members as well as others who participate in the survey. All participants in the electronics component supply chain are invited and encouraged to participate in the report so they can see the highly valuable insights provided by the ECST report. The return on a small investment of time is enormous!

The monthly and quarterly ECST reports present data in detailed tables and figures with multiple perspectives and covering current sales expectations, sales outlook, product cancellations, product decommits and product lead times. The data is presented at a detailed level for six major electronic component categories, six semiconductor subcategories and eight end markets. Also, survey results are segmented by aggregated responses from manufacturers, distributors, and manufacturer representatives.