

ECIA Industry Pulse Results Show Sustained April Strength but Cooling Sentiment Heading into Summer Months

ECIA's Industry Pulse: Electronic Component Trends and Sentiment April 2026

Dale Ford, Chief Analyst

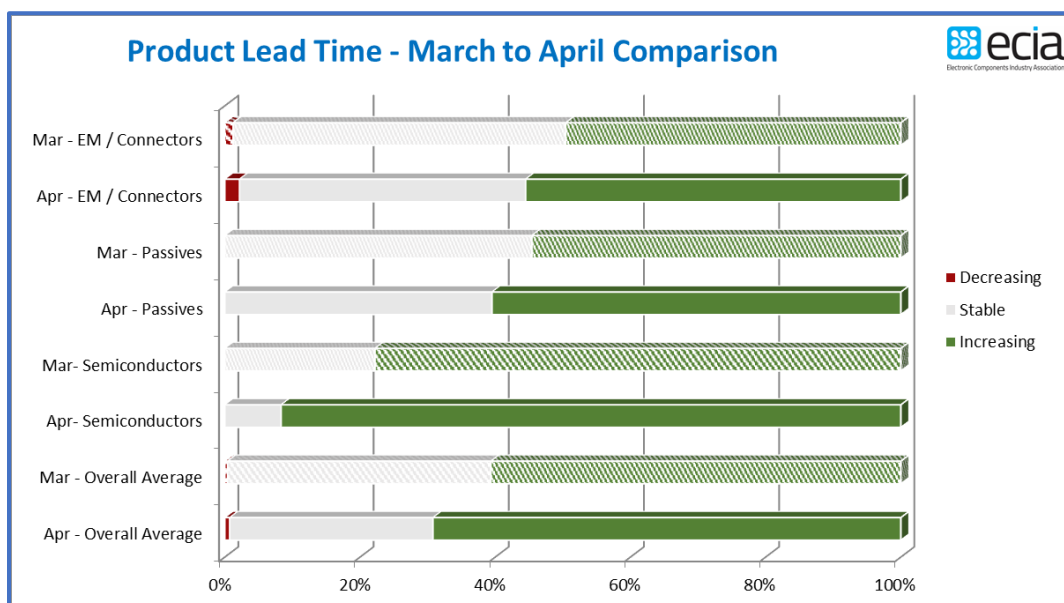
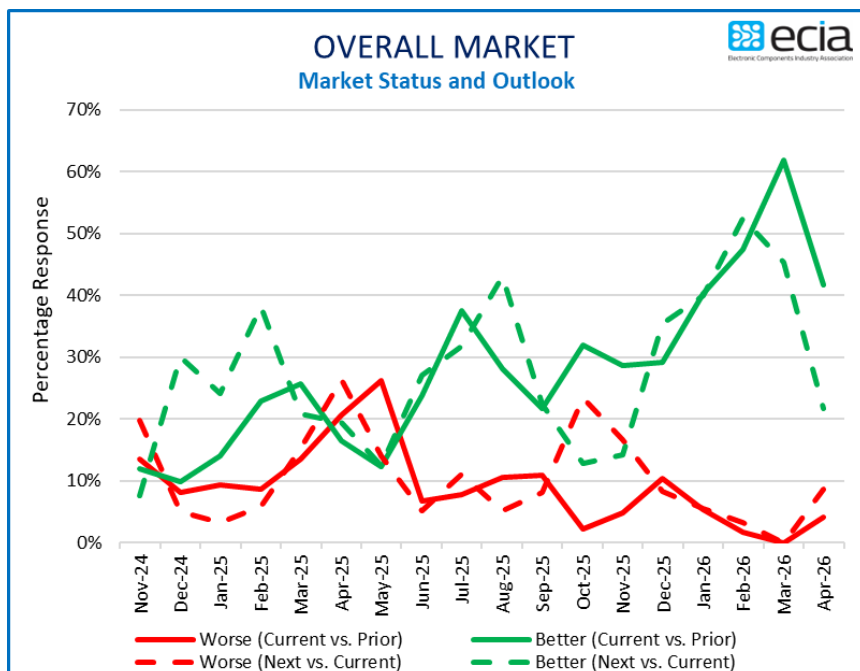
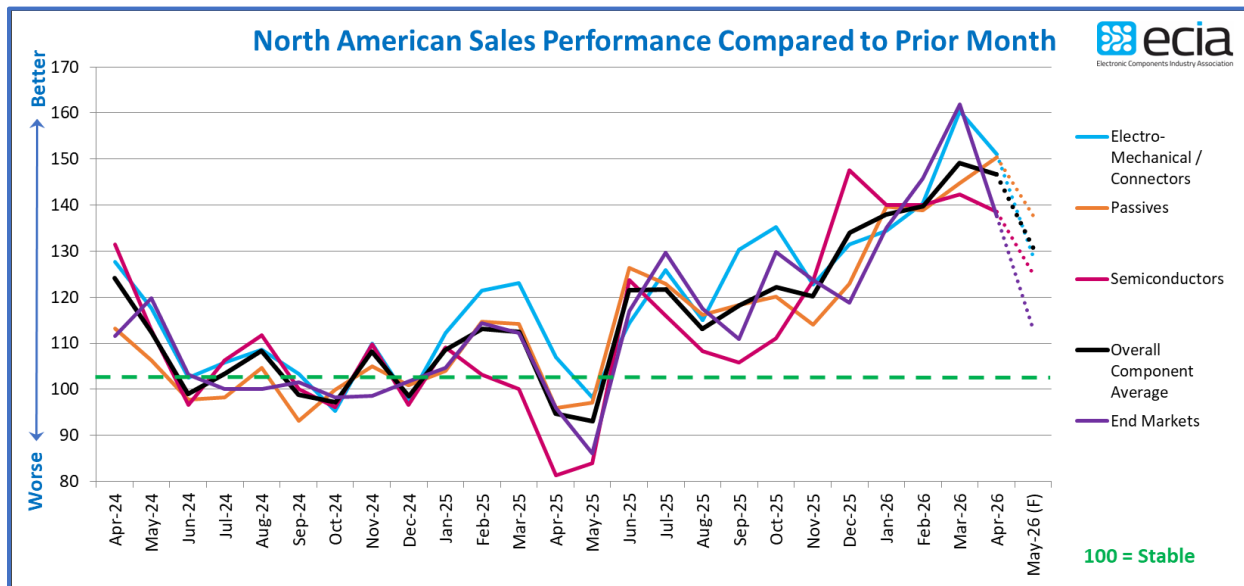
Overall sales sentiment sustained strong results in April following a leap in confidence in March. Overall sales sentiment only declined by 2.6 points to 146.6 in April. The positive view of sentiment for Passive Components continued to grow in strength in April as it jumped from 144.8 to 150.3 between March and April. By contrast, Electro-Mechanical Components still delivered the strongest overall sentiment but dropped by 9.3 points to 151.1 in April. Semiconductors maintained a relatively stable position as sales sentiment fell by only 3.8 points between March and April. Sales sentiment softens rapidly looking toward May with the overall sentiment score collapsing by 16.1 points to 130.5. Every component category is projected to experience a severe weakening in sentiment from April to May, with Electro-Mechanical Components taking the biggest hit with a decline of 22.3 points. This results in a unique outcome of Passive Components achieving the most optimistic outlook for May with a score of 137.8. However, even with this strong decline in the forecast, the overall view for sales sentiment is still extremely robust in the May outlook and stronger than November's sentiment six months ago of 120.1. Also, every individual component category achieves a sales sentiment score well above the 100-point threshold in the May forecast.

The most significant decline in the April Industry Pulse survey is found in the end-market assessment. The overall market score plummeted from a high of 161.8 in March to 137.5 in April and then falls another 24.5 points in the May forecast to wind up at 113.0. On the bright side, this strong decline in the index score for end-markets is primarily driven by fewer survey participants reporting expectations for better market conditions. Only 4 percent of survey responses assessed the sales environment as worse in April compared to March, and that only increased to 9 percent in the May outlook. Also, the scores for every end-market but two are well above 100 for both April and May. Only Consumer Electronics and Mobile Phones fall to the 100-point threshold during this time.

All three supply chain groups continue to report positive sales sentiment in every component sub-category from February to the May outlook. In a reversal from the March survey, Distributors express the strongest positive assessment in their scores for April, while Manufacturer Representatives are the most conservative. All three groups, including Manufacturers, are generally aligned compared to the overall average in the May outlook.

Lead time pressure jumped again in the April survey. In the overall average, 69% of survey participants report an increase in lead time pressure in April, growing from 61% in March. The strongest lead time pressure is found in Semiconductors, with 92% reporting an increase in lead time pressure. Reports of declining lead time pressure are essentially nonexistent in the April survey.

It is important to maintain a healthy perspective in analyzing the most recent Industry Pulse survey results. While the scores show a significant decline from the highs of March, the sales sentiment score is still very robust. Just one year ago the overall sales sentiment index fell below the 100-point threshold in April and May. The overall average score of 130.5 in the May outlook is dramatically better than the 93.1 score in May 2025. Even with the softer results for April and May, 2026 continues to show great sales sentiment health through the first five months of the year. Hopefully, this momentum will carry into the second half of 2026 and deliver a second year in a row of solid revenue growth in the authorized channel for electronic components.



The Industry Pulse 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 Industry Pulse 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 this report. The return on a small investment of time is enormous!

The monthly and quarterly Industry Pulse 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.