

ECIA's February and Q1 Industry Pulse Surveys Show Positive Sales Confidence Dominating Every Sector of the Electronic Components Industry

ECIA's Industry Pulse: Electronic Component Trends and Sentiment February & Q1 2026

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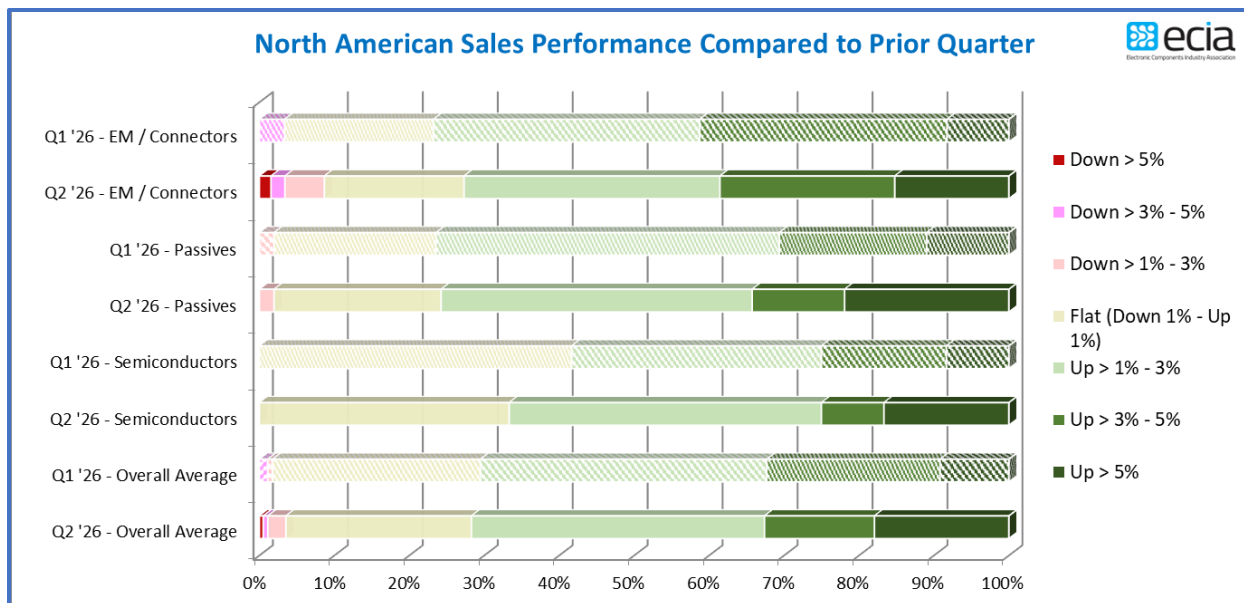
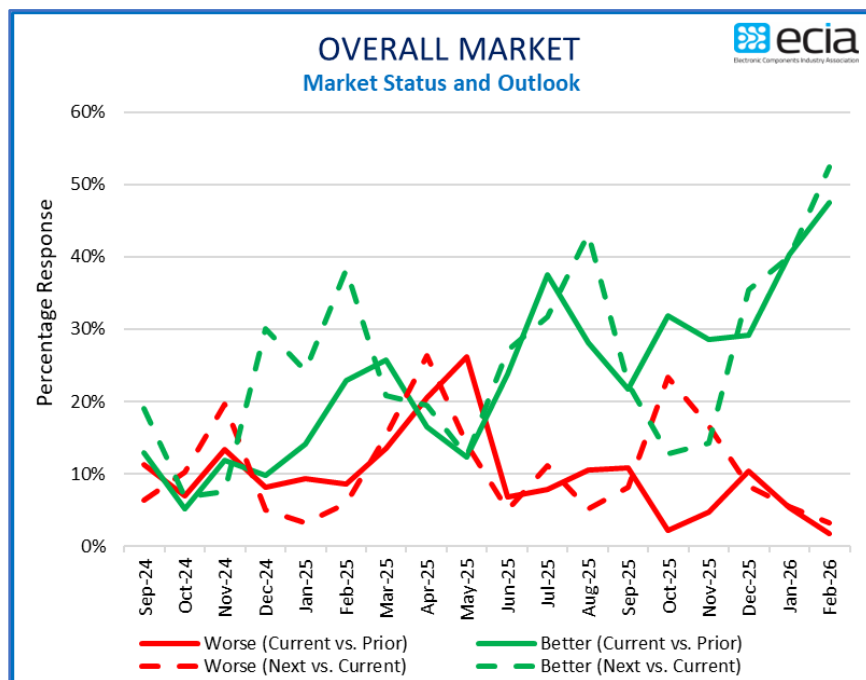
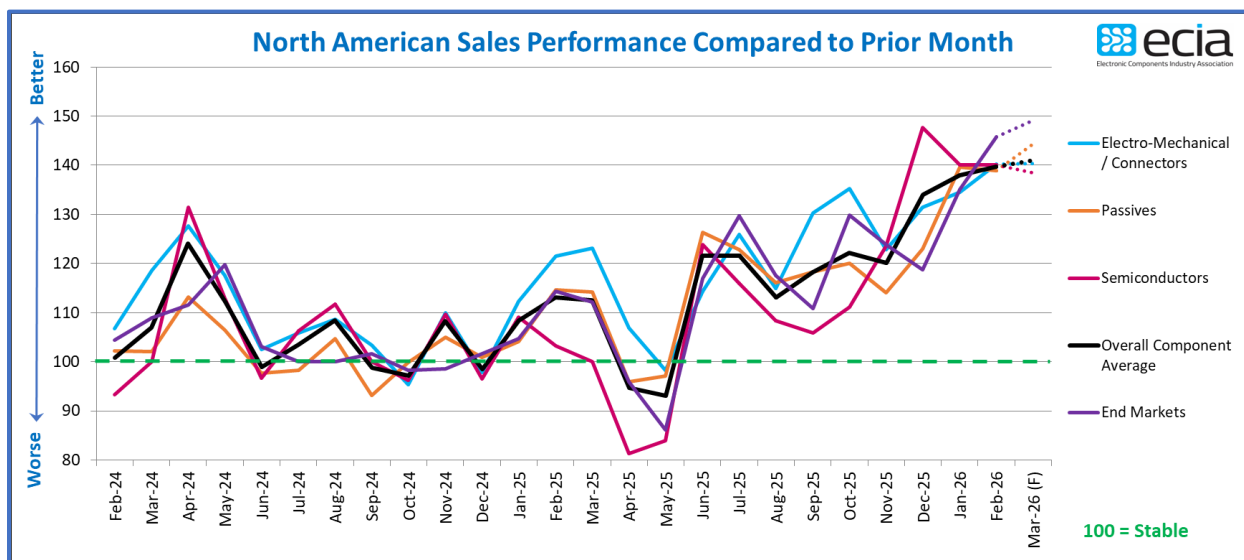
The average index score reported by the ECIA's February Industry Pulse survey shows sales optimism continuing to soar at lofty heights. Average sales sentiment inched up to 139.7 from 138.0 in January. This marks the ninth straight month of strong positive sentiment overall and in each of the major component categories. This is also the fifth consecutive month where every subcategory has registered robust positive results. (100 points is the threshold between positive and negative sales sentiment.) The outlook for March points to expectations for continued robust strength with a projected overall score of 141.1. The industry began 2025 on a strong upward path in sales sentiment before steep worldwide tariffs were imposed, which sent sales confidence plummeting below 100. Fortunately, the industry regained its footing in June with a return to strong sales optimism. Barring another unforeseen "Black Swan" event, 2026 should deliver a strong sales environment.

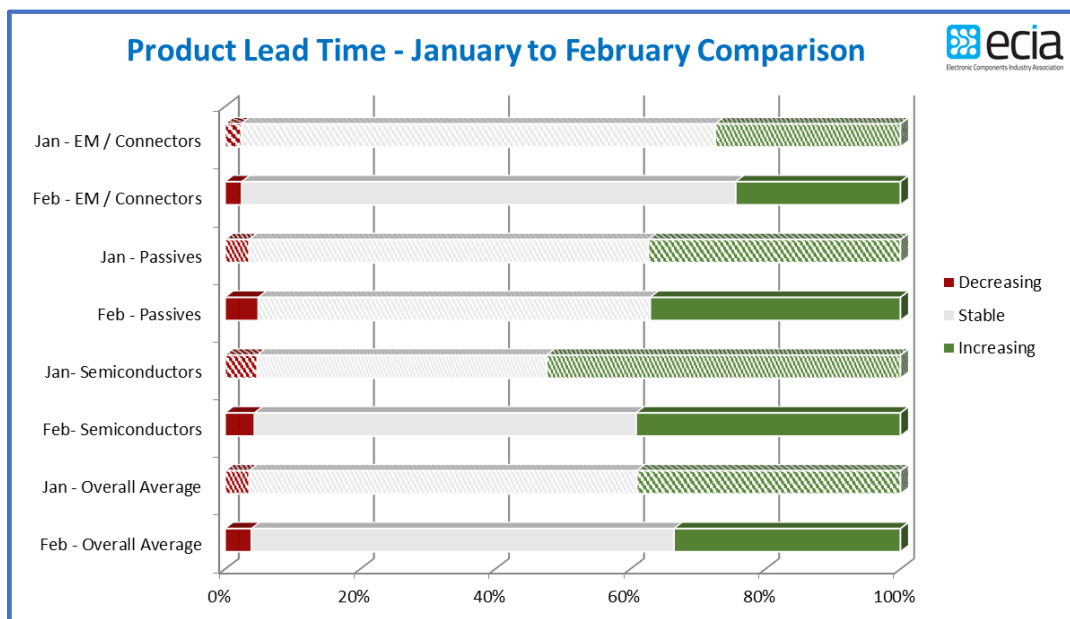
The results from the Q1 quarterly survey extend this expectation for a healthy sales climate all the way through the first half of 2026. The overall average share of survey respondents reporting positive sales growth was 71% in Q1 and 72% in Q2. Only 2% of survey participants in Q1 and 4% looking toward Q2 see negative sales expectations. In fact, not a single participant reported expectations for negative sales growth in both Q1 and Q2 in Semiconductors.

Distributors reported the strongest optimism for February and March, with an overall average of around 160. There is a wide gap in average sales sentiment between Distributors and Manufacturers and Manufacturer Representatives. These two groups deliver an overall index score between 119 and 130 in February and March. Even with this difference, it is notable that all three groups continue to report positive sales sentiment in every sub-category in both February and March.

The overall end-market survey average reached nearly 146 in February, the highest level since May 2021. This is expected to continue to improve to 149.2 in March. The positive end-market sales sentiment trend is reported for every market. The Avionics/Military/Space and Industrial segments continue to deliver the highest index scores. However, even Consumer Electronics and Mobile Phones at the low end deliver scores above 122.

Lead time pressure eased back significantly for Semiconductors in February as those reporting increasing lead times fell from 52% to 39%. Lead times remained fairly constant for Electro-Mechanical and Passive Components between January and March. It is notable that reports of decreasing lead times are rare, with only 2% seeing a decline in lead times for Electro-Mechanical components and 5% for Semiconductors. The severe mismatch between supply and demand for advanced memory ICs continues to present one of the greatest concerns for the overall health of the electronics components market. Limited supplies of these components could result in stalled sales in other segments. This has emerged as one of the most critical areas of supply chain management heading into 2026.





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.