ECIA's March Industry Pulse Survey Index Reaches Lofty Heights for Sales Sentiment

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

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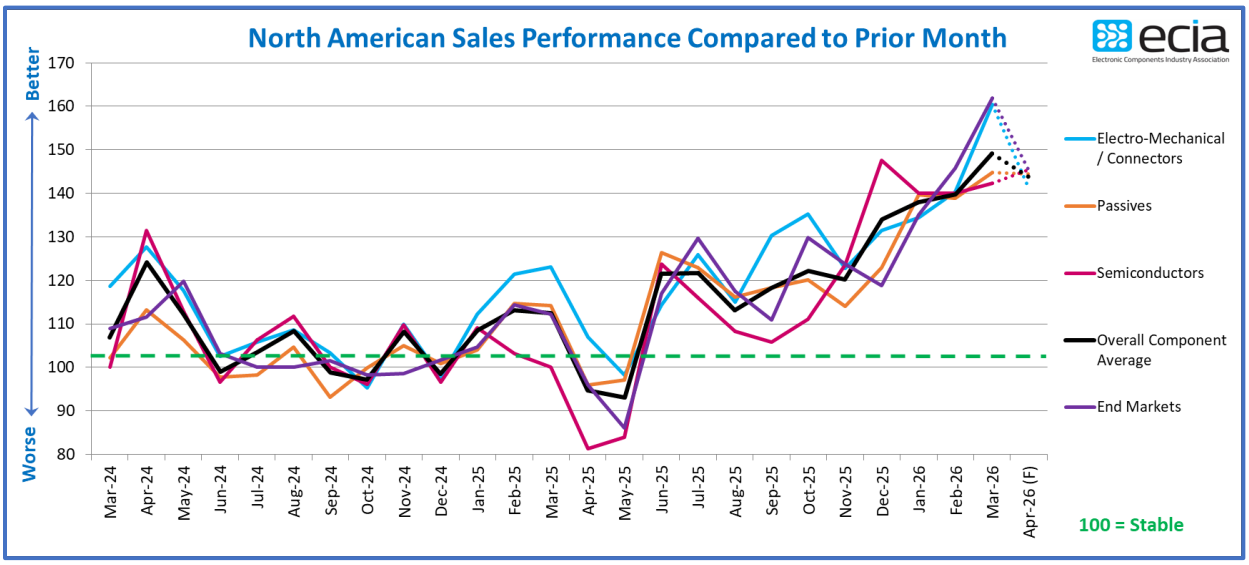
Sales confidence dominated every sector of the Electronic Components Industry in March, driving the overall sales sentiment index average up to 149.2, the highest level in five years, dating back to April 2021. All three component categories saw solid improvement, led by Electro-Mechanical with a jump of 20.2 points. Seven out of ten sub-categories for electronic components saw their sentiment score rise above 150. The score for two subcategories topped 160. The end-market index score mirrored the component categories as it rose by 16.1 points to 161.8. This exuberance is tempered by a softening in sales sentiment looking forward to April as the overall index is projected to retreat back to 143.7, slightly above the February measurement. The end-market index is predicted to drop back to 145.3, almost the same score as in February. Bottom line is that the sales environment for electronic components is the best it has been in five years!

Once again, all three groups continue to report positive sales sentiment in every sub-category from February to the April outlook, with only one exception in April. The Manufacturer Representatives express the strongest positive assessment in their scores, while Distributors are the most conservative, and Manufacturers match the overall average in general.

In reviewing the individual end-market index scores, it is hard to find any negative evaluations. Typically, the average percentage reporting a worsening market range between 2% to 4%. Many end-markets had zero reports of worsening markets, including the overall average. Consumer Electronics is the only exception, with 12% of respondents seeing a worsening market. Meanwhile, the index scores of improving sales sentiment range from 25% to above 60%. The only exception is Mobile Phones at 12%. Very simply, everywhere you look, the assessment in the latest Industry Pulse Survey reveals a highly positive market environment that has been on an upward path for the past eleven months.

Lead time pressure surged in the March survey, with the overall percentage of participants reporting increasing lead times jumping from 34% in February to 61% in March. The percentage of respondents reporting decreasing lead times is essentially 0% in March. The greatest pressure is being felt in the Semiconductor segment, with 78% of respondents reporting increasing lead times. 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.


North American Sales Performance Compared to Prior Month
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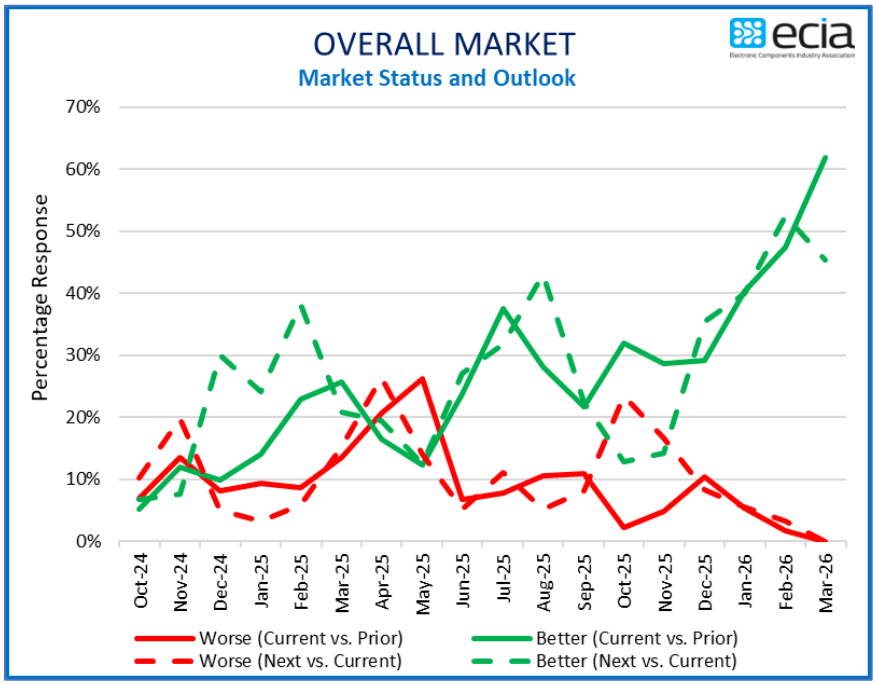
Electronic Components Industry Association
Better
Worse
170
160
150
140
130
120
110
100
90
80
Mar-24
Apr-24
May-24
Jun-24
Jul-24
Aug-24
Sep-24
Oct-24
Nov-24
Dec-24
Jan-25
Feb-25
Mar-25
Apr-25
May-25
Jun-25
Jul-25
Aug-25
Sep-25
Oct-25
Nov-25
Dec-25
Jan-26
Feb-26
Mar-26
Apr-26 (F)
Electro-Mechanical / Connectors
Passives
Semiconductors
Overall Component Average
End Markets
100 = Stable


OVERALL MARKET
Market Status and Outlook
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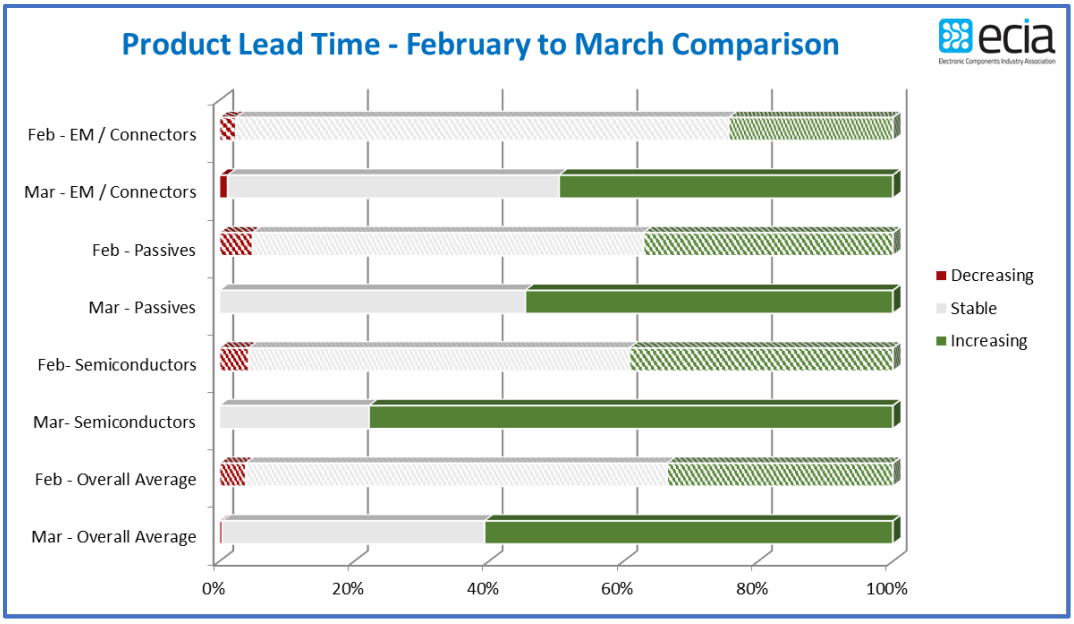
Electronic Components Industry Association
Percentage Response
70%
60%
50%
40%
30%
20%
10%
0%
Oct-24
Nov-24
Dec-24
Jan-25
Feb-25
Mar-25
Apr-25
May-25
Jun-25
Jul-25
Aug-25
Sep-25
Oct-25
Nov-25
Dec-25
Jan-26
Feb-26
Mar-26
Worse (Current vs. Prior)
Worse (Next vs. Current)
Better (Current vs. Prior)
Better (Next vs. Current)


Product Lead Time - February to March Comparison
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Electronic Components Industry Association
Feb - EM / Connectors
Mar - EM / Connectors
Feb - Passives
Mar - Passives
Feb- Semiconductors
Mar- Semiconductors
Feb - Overall Average
Mar - Overall Average
0%
20%
40%
60%
80%
100%
Decreasing
Stable
Increasing

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.